
STRATEGIC ECONOMIC DEVELOPMENT **PLAN FOR SOUTH DADE**

2020

Miami-Dade County
In conjunction with
The South Florida Regional Planning Council
Economic Development Council of South Miami Dade

This plan has been funded through a
U.S. Economic Development Administration Grant and Matching
Funds from Miami-Dade County



TABLE OF CONTENTS

SECTION 1

Executive **Summary**

SECTION 2

COVID-19 **Responses**

SECTION 3

Background **to the Market**

SECTION 4

Opportunity Sites **Evaluation and Recommendations**

SECTION 5

Goals, Approach and Organizational/Implementation **Considerations**

SECTION 6

Specific Target **Industry Strategies**

SECTION 7

Estimated Economic & Fiscal Impacts of **Implementation Strategy (REMI)**

SECTION 8

Initial Market **Approach**

SECTION 9

Implications of Sea Level Rise/Climate Change on Economic **Development**

APPENDIX A IEDC **ROADMAP**

APPENDIX B TIER 1, 2, & 3 **SITES**

APPENDIX C LITERATURE REVIEW **SUMMARY**

ACKNOWLEDGMENTS

The South Miami-Dade Economic Development Strategy project sincerely thanks the many committed community and business leaders in the South Miami-Dade region who have donated their time and support in this effort. This strategic plan represents the investment that their dedication has produced – a strategy that can adjust to the challenges faced in the community and will grow in time to meet future needs. The ongoing commitment of the community to implement this strategy can lay the groundwork for a sound economic future for South Dade.

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SECTION 1

EXECUTIVE SUMMARY

The South Miami-Dade County regional economy is incredibly diverse. From urbanized areas surrounding the Metrorail at Dadeland Station South to the suburban areas of West Kendall to the farms of the Redland, and two national parks, there is no other region in South Florida with less than 600,000 residents which has as much diversity to geography and subsequently its economy. In one respect this is of tremendous benefit given it provides a wide foundation upon which to build an economic base and associated development strategy. In another, it creates a significant challenge given the business interests of the region and their interests are by their nature so diverse that it creates difficulty in deploying a focused strategy to enhance economic prosperity. The Strategic Economic Development Plan detailed herein is organized to both leverage off of the economic diversity of the region yet remain focused enough to build on tangible grounded opportunities to grow business activity, investment, and subsequent, good paying jobs in the region.

However, between the beginning of the development of this Strategic Economic Development Strategy in October of 2019 and the preparation of this plan document, the global economy has faced its biggest threat as a result of a viral pandemic in over a century. In turn, implementing the long term economic development strategies outlined herein while central to the long term growth of the South Dade economy must take a back burner to the immediately stabilization and recovery requirements once the COVID-19 threat begins to wane and the world moves into an extensive phase of vaccinations. As a result, an entire standalone section of this report is devoted to this interim COVID-19 economic stabilization and recovery period. It is expected that once the local economy is stabilized, the longer term economic development strategies outlined within this plan will be as relevant as ever.

STRATEGIC PLAN HISTORY

HOW DID WE GET HERE?

The Strategic Economic Development Plan for South Dade is the culmination of a planning effort which began in 2014 through the Tomorrow's South Dade visioning process. Tomorrow's South Dade brought together hundreds of business community members and residents from across South Dade over several months to envision what the economic future of the region could be. The effort resulted in a concise report which outlined the community's vision for the future of South Dade and its economy.

Following Tomorrow's South Dade, a reengaged Economic Development Council of South Miami-Dade (EDC) with seed funding from private entities in South Dade and Miami-Dade County began to formulate a more detailed economic development strategy through the More to Explore working group and with the assistance of the International Economic Development Council, developed a Roadmap to implement the strategy. The Roadmap is included in this Plan as Appendix A.

Subsequently, Miami-Dade County in conjunction with the South Florida Planning Council and the EDC submitted an application in 2018 to the U.S. Economic Development Administration to prepare a detailed Economic Development Strategy for the entire South Dade region in conjunction with the South Dade community. This planning document is the culmination of the effort and work funded by that grant.

THE PROCESS

DEVELOPING THE STRATEGIC PLAN

The South Dade Economic Development Strategy and Plan is built on information drawn from the South Dade community since 2016, and was driven by additional information collected directly from the local business and resident community. The plan has been developed on the foundation of an extensive outreach process that included three large community meetings, a large employer survey, a series of specific industry discussion and reviews through meetings and conference calls, and literature and data review of nearly every pertinent local plan and study developed for the South Dade region over the past two decades. As part of the preparation of this plan, information gathered from meetings and historic studies which might be dated was vetted by comparing collected information to hard data to ensure that plan recommendations are supported by the market realities and not just opinion or stale facts. Likewise, the plan is based upon the input of economic development professionals within the State of Florida who shared their experience as to what works and what doesn't at a sub-county level and within areas of diverse economic interests. Finally, the plan and its findings have been peer reviewed by a representative of the International Economic Development Council which previously issued the economic development roadmap for the area included as an attachment to this report.



TARGETED STRATEGIC PLAN

STRATEGIES & RECOMMENDATIONS

Although population growth has been and will continue to be robust for the foreseeable future, South Dade is not generating the jobs to support its resident base when compared to other areas of the county.

While both population and employment densities in South Dade are lower than more urbanized area of the County, employment densities in South Dade when compared to South Dade population has a particularly large gap when compared to other urban areas of the County. Indeed, compared to the County overall, and despite similar age and family size profiles, South Dade has approximately ½ the number of jobs per resident when compared to the entirety of Miami-Dade County. This reality is one of the core rationales for a South Dade targeted economic development effort.

As is the case with virtually any successful economic development strategy or effort around the country, a core focus of the Plan is devising a strategy where the South Dade economic development community focus is on targeted industries or industry clusters which are either well established in the region and need to be supported or are emerging in the region and can be further exploited. The word “Exploitation” often has negative connotations associated with it, but in this particular case, the strategy outlined herein focuses on positive exploitation of private investment to drive creation of sustainable, healthy, and well-paying jobs for South Dade residents.

The targeted industries highlighted in this strategy were identified based upon the research, interviews, and community input and fall into two groupings or categories.

Emerging Industries including Health Care, Aviation Maintenance Repair & Overhaul (MRO), Tourism, Professional Services, Logistics, and Insurance which from a South Florida regionwide perspective are projected to experience significant growth within the foreseeable future and South Dade has participated in that growth in the recent past.

Traditional Industries including Defense, Agriculture, and Retail for which broad regional growth is expected to be slow, static, or negative are major industries in South Dade and as such are important to the South Dade economy and also help define the unique nature of South Dade.

The strategic plan in Section 4 identifies specific geographic areas in South Dade which are best suited or most likely to attract or house clusters for each of the industries so that resources such as infrastructure improvements, incentives, or tax increment financing can be deployed in targeted geographic areas/zones rather than through a scatter-shot approach. This does not imply that other industries, such as Manufacturing, should be ignored as it relates to supporting their investment and growth or have no interest in locating within South Dade, only that the targeted industries are the most likely from a growth and positioning perspective to create the largest amount of employment over the near term.

Additionally, for each of the industries above, this strategy details within Section 6 targeted industry specific actions which should be undertaken to support the growth and health of each of these industries and well as the entity(ies) that are best positioned to implement the strategy and each of the action items. These are summarized within a series of matrices in Section 5.

No matter the entity which has been identified as the lead entity to undertake each one of the economic development action items within each matrix, this strategic plan is unambiguous in the need for the establishment of a rationally funded Local Economic Development Organization (LEDO) which leverages the strong foundation of the Economic Development Council of South Dade (EDC). The need for a strong South Dade LEDO or reinvigorated EDC became clear from regional stakeholder interviews and the local economic development panel held during Community Meeting 2 on January 31, 2020. A region as distinct in development pattern and industry mix as South Dade with nearly 600,000 residents and 140,000 workers, will significantly benefit from a coordinating entity whose sole mission is to promote and advocate for implementation of South Dade's economic development strategy.

The South Dade LEDO as proposed is designed to be fully integrated and coordinated with the County, South Dade municipalities, SFRPC, Beacon Council, and Enterprise Florida in this effort. The strategic plan outlines an initial budget to stand-up the LEDO with approximately \$625,000 to \$650,000 annually, and the goal is to be operational by mid-2021 and fully operational by early 2022. In order to ensure as close a coordination with governmental entities as possible and provide support for public funding, the plan recommends governance with an operating board of principally private industry individuals who are managers or owners of businesses in South Dade but are principally appointed by county and municipal authorities. A n advisory board of key organizations and businesses throughout the community should be established to further support the EDC Board of directors. The plan anticipates the hiring of a full time executive director for the LEDO.

THE VISION

Based on the multitude of input from South Dade residents and active participants in the varied sessions that have been held, a Vision Statement for the area was developed which encapsulates the primary economic development objectives for the region.

A community where people desire to live, work and play; Where sustainability is a guiding principle and not an afterthought; Where the traditional industries of agriculture, Defense, health care, tourism, and retail can be maintained and otherwise thrive to the level which the global market allows; and, where establishing the foundation for newly emerging industries by making better use of existing and expanded infrastructure, becomes a reality.

ESTABLISHING TANGIBLE GOALS & OBJECTIVES

A rational economic development strategy and plan cannot be complete without tangible goals and objectives against which to measure success. Indeed, as it relates to economic development strategies the overriding goal is measured in the number of decent paying jobs which are created in sustainable and environmentally sensitive industries in the region. To this end, the plan includes the following goals and objectives:

In the immediate term, a core objective of the plan is to achieve recovery from the tremendous economic displacement caused by COVID-19, and under the assumption that a vaccine will be available in early 2021, that employment and business activity in the region recover to its year end-2019 levels by the early 2024.

For those Emerging Industries or critical area industries detailed within the plan including Transportation and Warehousing, Finance & Insurance, Professional Services, Health Care and Accommodations & Food Service, the goal by 2027 is to increase the growth in number of jobs by a multiplier of 1.5 times the recent historic ratio of South Dade vs. countywide jobs for a specific industry.

For example, assuming there are currently 2,000 jobs in South Dade in Industry A which is 20% of the County's 10,000 Industry A jobs; if the County's Industry A jobs grows by an additional 5,000 by 2027, then the goal for South Dade is that 1,500 of those jobs will be created in the region (5,000 new Industry A jobs x 20% historic South Dade fair share of Industry A jobs x 1.5 multiplier goal = 1,500 new Industry A jobs in South Dade)

For long term historic Target Industries, including Agriculture, Retail and Public Administration (Defense), the goal is to maintain South Dade employment at current levels through 2027.

Currently, approximately 175,000 residents of South Dade travel outside of the region every day for work. A secondary goal is to grow the ratio of workforce which lives in the region to work in the region. This has broad implications for improving mobility and quality of life for residents of the area.

A core goal and objective of this strategy is to promote general wage growth among South Dade workers both through the diversification of industries to traditionally higher wage industries but also by advocating for policies at the County, State and Federal level which create a level living wage playing field which is rationalized for all businesses;



The economic development strategy for South Dade is oriented to growing emerging industries which are resilient and friendly to environmental considerations. Even industries such as Aviation MRO which might appear on the surface to be carbon unfriendly, is an industry which is very much oriented today to integrating new technology into planes so that they are more fuel efficient and have the suite of avionics which will allow them to participate in significantly advanced routing which in turn reduces carbon emissions.

Finally, a core goal of the strategy is to support small business creation and enhance the 24-month survival milestone which research indicates is an important threshold for small businesses to be self-sustaining. This includes businesses that build or leverage emerging technology and are not as geographically constrained as in the past. If there is any silver lining from the current pandemic it has been the increased willingness of companies of all sizes to allow to work from wherever they are rather than in traditional office space or campuses. Many of the largest tech companies have given workers at least until the end of 2021 to work from wherever they are. South Dade, which provides a range of housing choice, a high quality of life, and proximity to urban amenities and one of the nation's most important international hub airports, Miami International Airport, could be expected to benefit from any fundamental shift in the nature/location of work which may occur as the global economy emerges from the COVID-19 emergency.

Utilizing the REMI input/output model platform Miami-Dade County measured the relative economic and fiscal benefits of realizing enhanced job growth in targeted industries which could result from a South Dade targeted economic development effort. The growth was measured against a historic baseline and is indicative of what a modest target investment translates into as it relates to economic gain for Miami-Dade County. In sum, the model provides clear justification for investing in a smart and targeted regional economic development strategy. The model indicates that total marginal employment growth between 2020 and 2027 in the region (including direct, indirect and induced) ranges from a total of 4,187 new jobs under a minimum impact scenario to nearly 17,000 additional jobs under a maximum impact scenario. Likewise, as it relates to fiscal impacts to Miami-Dade County and the South Dade region's municipalities, it is estimated that under a minimum scenario the marginal fiscal benefit could be as much as \$14 million per year and \$46 million under a maximum scenario. A well formulated and ultimately successful economic development strategy which grows economic investment and jobs is a wise investment by any measure.



STRUCTURE OF PLAN THAT FOLLOWS

Beyond the Executive Summary, the remainder of this Plan is broken down into seven additional sections as follows

SECTION 2

Details the near term economic response associated with the COVID-19 crisis,

SECTION 3

Is the Economic Background to the Market which provides the fundamental data that serves as the underpinnings of the Strategy.

SECTION 4

Is an evaluation of the opportunity sites and recommendations for the strongest locations within South Dade where industry should and can be developed.

SECTION 5

Addresses the core plan vision, SWOT, goals, and associated strategies for implementation.

SECTION 6

Provides an overview and strategy description/matrix associated with implementation for each emerging and target industry.

SECTION 7

Is an outline of a Marketing Strategy for South Dade.

SECTION 8

Addresses the implications of sea level rise and climate change on future economy of South Dade.

The plan is supported by a range of appendices which provide additional information that inform and support the future implementation of the Strategic Plan including but not limited to a detailed summary of a literature review which was completed as part of the plan and helped guide the foundation for the plan.

SECTION 2 COVID-19 RESPONSE

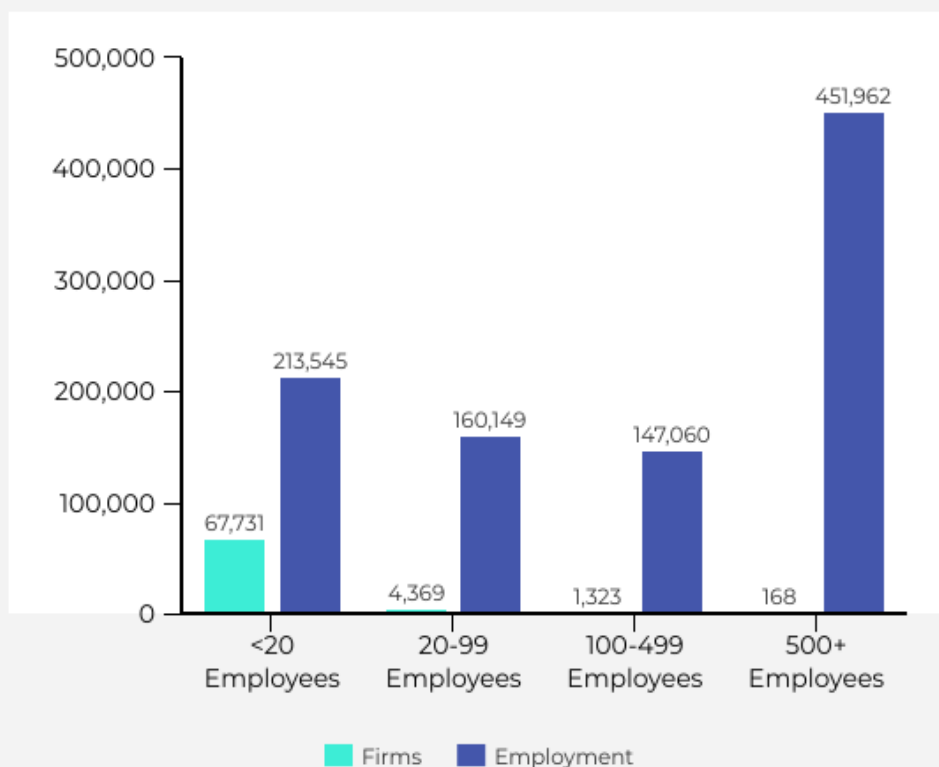
During the course of developing this strategic plan, the COVID-19 pandemic hit South Dade along with the rest of Miami-Dade County, Florida and the world. While the core recommendations of the plan certainly are valid as it relates to building the economy of South Dade over the longer term, due to the sweeping economic impact of the pandemic and the uncertainty of how long the impact will persist, we have identified a set of strategies developed to address this immediate challenge.

Over the past 30 years, South Dade has proven to be very resilient to natural disasters and/or public policy decisions which had a major negative economic impact on South Dade for a period of time. These include Hurricane Andrew, a 1993 Base Realignment and Closure that downsized Homestead Air Force Base, the North American Free Trade Agreement (NAFTA) which changed the face of agriculture, 9/11 which impacted tourism, and the 2008 mortgage collapse which impacted the real estate market. Faced with each of these economic challenges, South Dade was able to look to Miami-Dade County, the State of Florida and the Federal government to seek needed financial and organizational assistance. However, COVID-19 has impacted economies at every level, thus highlighting the need for a specific strategy with strong local leadership.

Possibly, the only positive aspects of the pandemic are the reduction in traffic, air pollution and impact on the natural environment that has been seen due to the increase in people working from home. The need to work from home has forced us to maximize available technology to hold online meetings in an effort to continue business operations. Eventually, this may lead to individuals continuing to work at home, reducing the number of people in South Dade who currently commute north daily. Nationally, projections range from 12 to 20 percent as to the potential reduction in demand for commercial space as a result of people working at home. This will benefit what is a significant bedroom community for other job centers in the County.

Notwithstanding the long term realignment in how people work, the impact of the pandemic is especially concerning to South Dade due to the fact that employment in Miami-Dade is dependent on small businesses. Nearly 92 percent of total businesses in Miami Dade County have less than 20 employees and this is particularly the case for South Dade where even the 50th largest employer, as measured by number of employees, in the region has less than 200 workers.

Figure 1: Employment by Firm Size; Miami-Dade County
Source: U.S. Department of Commerce; BEA



The Board of County Commissioners, at the request of Commissioner Joe Martinez, established the COVID-19 Economic Recovery Task Force. The purpose of this task force is for advising this Board on issues related to an economic recovery in the County in the aftermath of COVID-19, including but not limited to: identifying resources, such as grants, loans, and other financial assistance, available to businesses in Miami-Dade County; the establishment of public outreach and information programs; and recommendations regarding possible Board actions that would aid with such economic recovery. As part of the duties, the Task Force shall review any relevant data, studies, assessments, reports, and evaluations relating to the economic impact of COVID-19 in Miami-Dade County and may hear additional presentations and comments from relevant stakeholders and members of the public. Consistent with the purpose of the Task Force, it shall prepare a written report with information and recommendations to this Board including, information regarding available resources, for communicating such information to the public, and for possible Board actions that would aid with such economic recovery.

The Task Force is composed of local individuals appointed by the Board of County Commissioners and includes 3 members representing the South Dade area that is the subject of this report. The Task Force has established 3 Working Groups that cover the subject areas of Marketing/Outreach, Industry/Small Business, and New Normal Guidelines/Needs Assessment. The working groups have put forward a series of recommendations that have been presented to the Board of County Commissioners and are in the process of distributing a COVID-19 Needs Assessment to business to determine the economic impact of COVID-19.

Specific impacts from the pandemic to economic activity in the region include the following:

The pandemic is severely impacting Tourism, Retail, Agriculture and Healthcare – industries that represent the core South Dade's traditional economy and, with the exception of Retail and Agriculture, had been projected to be areas of employment growth for South Dade.

Prior to the pandemic, accommodation and food services employment was slated to grow by 8.5% over the next 8 years in Miami-Dade County, yet this growth may be thwarted by a potential trend for restaurants to close altogether or remain in a takeout only mode. Hotels are also likely to feel the lingering impact of the drop in travel.

As it relates to Agriculture and Retail, the pandemic has demonstrated how agriculture needs to be better connected to countywide supply chains and economic efforts. Miami-Dade County recently allocated \$900,000 to local food banks for the local agricultural product for distribution to people in need. The pandemic will also almost certainly accelerate the projected reduction in retail employment.

The impact on healthcare will depend on the availability of Federal funding to make up for loss of revenues from elective medical procedures and the increase in expenditures for protective equipment and providing services to uninsured patients.

Local governments continue to lose revenues due to reduction in sales tax revenue, other use taxes and reduced transit use. Miami-Dade County is projecting a loss in revenue of approximately \$300M over the next year. Real estate foreclosures and reduced demand for commercial real estate due, in part to the projected contraction in retail, are slated to increase over the coming months. These events will also have an impact on local governmental revenues.

RECOMMENDED COVID-19 NEAR TERM STRATEGIES

Miami-Dade County has established a countywide COVID-19 Economic Recovery Task Force which includes representation from South Dade. The Task Force is focusing on small business and industry, marketing and outreach, and new normal guidelines. These working groups are also reaching out to the municipalities ensuring that all information and efforts are distributed countywide. However, South Dade should make a concerted effort to ensure that the needs of the region which are unique to the region are incorporated into the broader countywide COVID-19 recovery effort.

In light of the economic disruption specific to South Dade that we expect to last beyond the lifting of the current restrictions, and the unique nature of South Dade major industries in comparison to the County as a whole, we believe there are two immediate strategies which the County and its municipal partners should deploy.

STRATEGY 1

The Local Economic Development Organization that continues to be referred to in this South Dade Strategy report should start convening, in partnership with the cities in South Dade and Miami-Dade County, a South Dade COVID-19 Recovery Working Group. The core participants should include the major economic development entities/drivers in the area including:

Miami-Dade County
Five South Dade Municipalities (Pinecrest, Palmetto Bay, Cutler Bay, Homestead, & Florida City)
Greater Miami Convention and Visitor's Bureau
The Beacon Council
Chamber South
South Dade Chamber
Local Banks
Miami-Dade College
Baptist Hospital
Public Health System
Community Health, Inc.
Farm Bureau
FPL; and,
University of Florida TREC

The goals of the COVID-19 Working Group should include:

Assessing the state of the South Dade economy post COVID-19;

Identify specific tactics for assistance to local business;

Develop a program that focuses specifically on micro-businesses (firms that employ up to 20 employees); and,

Identify economic development policies that help to replace jobs/industries lost in South Dade economy as the result of the closing of businesses which are unlikely to survive after the pandemic.

STRATEGY 2

Miami-Dade County should file an application for EDA funding specifically to fund South Dade economic recovery implementation.

Indeed, this plan is funded through the U.S. Economic Development Administration's disaster relief funding program that resulted from Hurricane Irene in 2018 and is being developed in the midst of what is the greatest economic disruption since the Great Depression.

As the South Dade Community recovers from COVID-19, it should again look to the EDA in its mandated role to serve as a vehicle for enhancing federal interagency coordination, information sharing, communication, and collaboration in both the pre- and post-disaster timeframes. The EDA stated goal of supporting the capacity of local, state, tribal, and territorial governments, nonprofits, and the private sector to produce a multi-dimensional strategy capable of supporting economic recovery and enhancing community resilience is entirely aligned with the current needs of the region.

As the community convener for economic development issues in South Dade, the LEDO will have critical role in the effort to recover from any form of economic disaster.

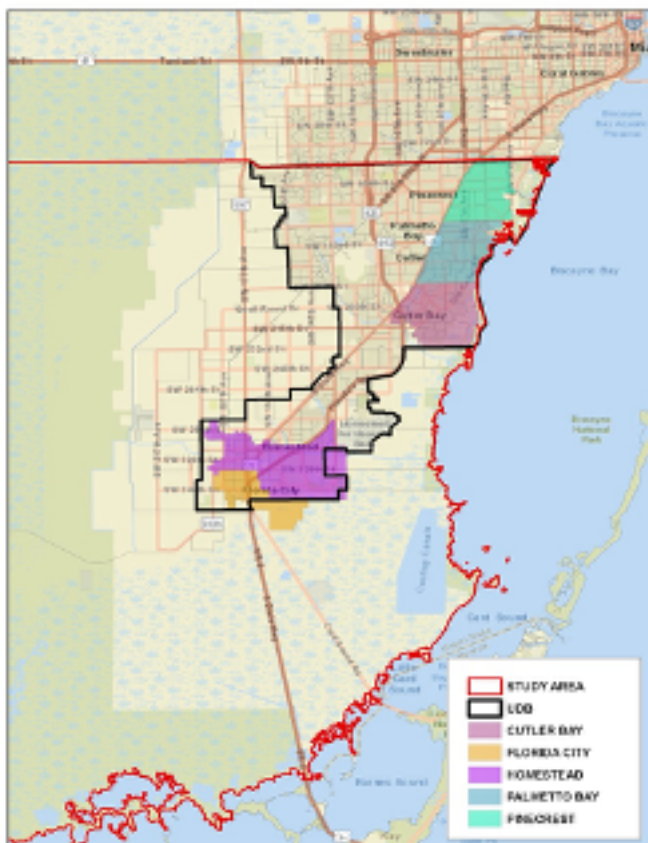
The LEDO can bring the community together to benefit from programs that are available at the Federal, State and Local levels to bring much needed information to local businesses and potentially, work with governmental agencies to implement disaster recovery programs.

Through the development of this plan, the County has established a relationship with EDA. This relationship must be maintained and nurtured to remain current with the latest economic recovery information.

SECTION 3 BACKGROUND TO THE MARKET

Different people perceive the boundaries of South Dade in different ways, but for purposes of the Economic Development Strategy herein “South Dade” has been defined as the entire Miami-Dade jurisdictional area south of Southwest 88th Street (Kendall Drive). South Dade contains five municipalities although vast majority of land area is within unincorporated Miami-Dade County. Likewise, a substantial portion of the planning area is outside of the Urban Development Boundary (UDB) and is designated as “Agriculture” on the DBMP Land Use map. The land Use Element of the CDMP states that principal land uses in this area should be agriculture, uses ancillary to and directly supportive of agriculture, and residential uses at a maximum density of one dwelling unit per five acres. The Strategic Planning Area and Urban Development Boundary are shown in Figure 2.

Figure 2: South Dade Strategic Planning Area



DEMOGRAPHIC SNAPSHOT

Who lives in South Dade is important to the current & future economic activity of the region. Key highlights of demographic conditions related to the future of economic development include the following:

South Dade comprises just over 1/5 of Miami-Dade County's population;

Incorporated areas in South Dade account for less than 1/3 of South Dade's population;

Median household incomes in South Dade are nearly 25% above that of the County's although the region has great variability in incomes by neighborhood; and,

Nearly 2/3 of housing units are occupied by owners.

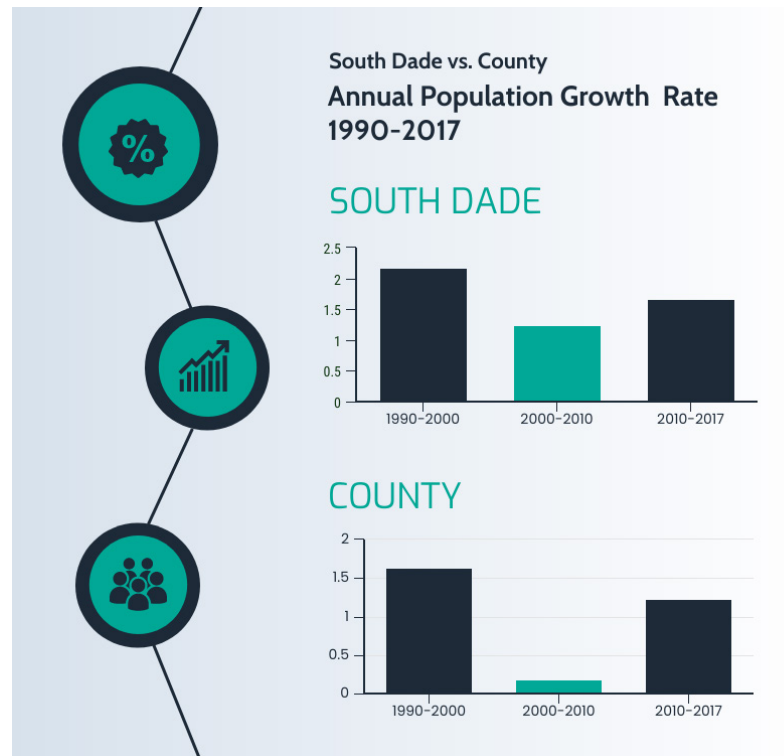
South Dade also has been one of the most rapidly growing areas of the County as it relates to population.

Figure 3: South Dade Demographic Snapshot as of 2017 (year latest figures are available for)
Source: 2000 & 2010 from Decennial Census; 2017 from Census' American Community Survey

	Total Planning Area	Cutler Bay	Florida City	Homestead	Palmetto Bay	Pinecrest	Miami Dade
Total Population 2017	596,439	44,721	12,149	67,354	24,679	19,441	2,664,418
2010 Population	528,062	40,286	11,245	60,512	23,410	18,223	2,496,435
2000 Population	439,347	NA	7,843	31,909	NA	19,055	2,253,362
Median Household Income 2017	\$65,143	\$70,473	\$34,545	\$43,150	\$107,612	\$152,643	\$52,990
% Above \$50,000 2017	56.5%	68.0%	47.2%	42.4%	76.4%	78.4%	45.2%
% Owner Households 2017	63.7%	70.7%	26.2%	39.2%	85.2%	77.0%	52.6%
% Renter Households 2017	36.3%	29.3%	73.8%	60.8%	14.8%	23.0%	47.3%

Figure 4: South Dade vs. County Annual Population Growth Rate 1990-2017

Indeed, while the planning area had just over 1/5 of the county's population in 2017, it is projected to account for 42% of population growth through 2040. Although urban center such as Downtown Miami and Coral Gables are often the focus of stories around the revitalization of dense urban cores and will continue to experience high density development pressure, South Dade will continue to be one of the major growth areas in the County for the foreseeable future



As it relates to where in South Dade that growth will occur, based upon population growth projections by small area Transportation Analysis Zone (TAZ) through 2040, the majority of growth in South Dade is expected to be heavily concentrated along the U.S. 1 corridor, as clearly illustrated in Figure 6 below .

Figure 5: South Dade in comparison to Miami-Dade County Population Growth Historic and Projected 2040
Source: Miami Dade TPO

	POPULATION CENSUS	POPULATION CENSUS	POPULATION CENSUS	POPULATION CENSUS	PROJECTIONS POPULATION
	1990	2000	2010	2017	2040
South Dade	354,012	439,347	528,062	596,439	780,497
All Miami-Dade	1,914,672	2,253,362	2,496,435	2,664,418	3,102,138

	AVERAGE ANNUAL GROWTH	AVERAGE ANNUAL GROWTH	AVERAGE ANNUAL GROWTH	AVERAGE ANNUAL GROWTH	PROJECTIONS AVERAGE ANNUAL GROWTH
	1990	2000	2010	2017	2040
South Dade	-	8,534	8,872	9,768	8,415
All Miami-Dade	-	33,869	24,307	23,998	20,190

	POPULATION ANNUAL % GROWTH	POPULATION ANNUAL % GROWTH	POPULATION ANNUAL % GROWTH	POPULATION ANNUAL % GROWTH	PROJECTIONS ANNUAL % GROWTH
	1990	2000	2010	2017	2040
South Dade	-	2.18%	1.86%	1.75%	1.31%
All Miami-Dade	-	1.64%	1.03%	0.93%	0.73%

Figure 6: South Dade Population Growth Projections by TAZ
Source: Miami-Dade Transportation Planning Organization

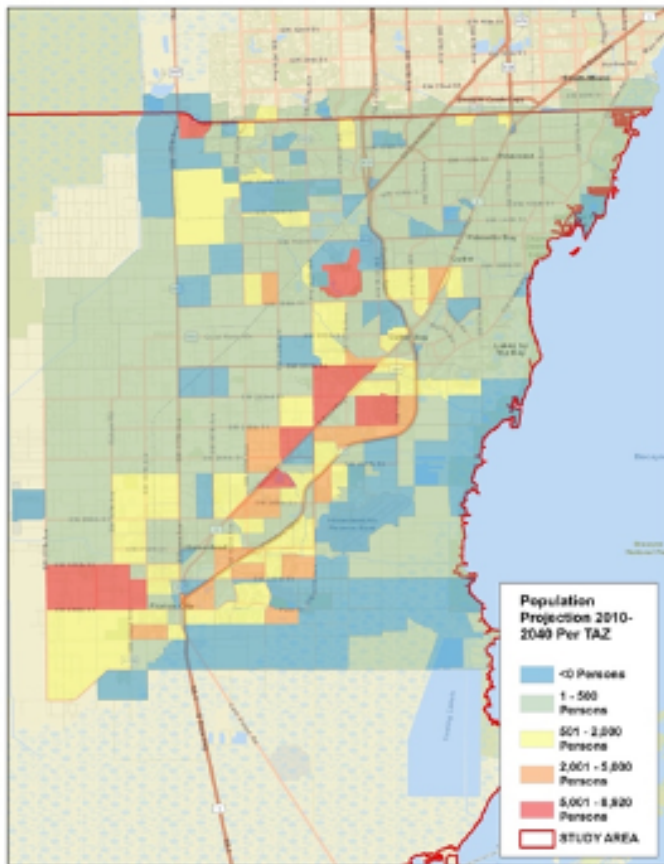
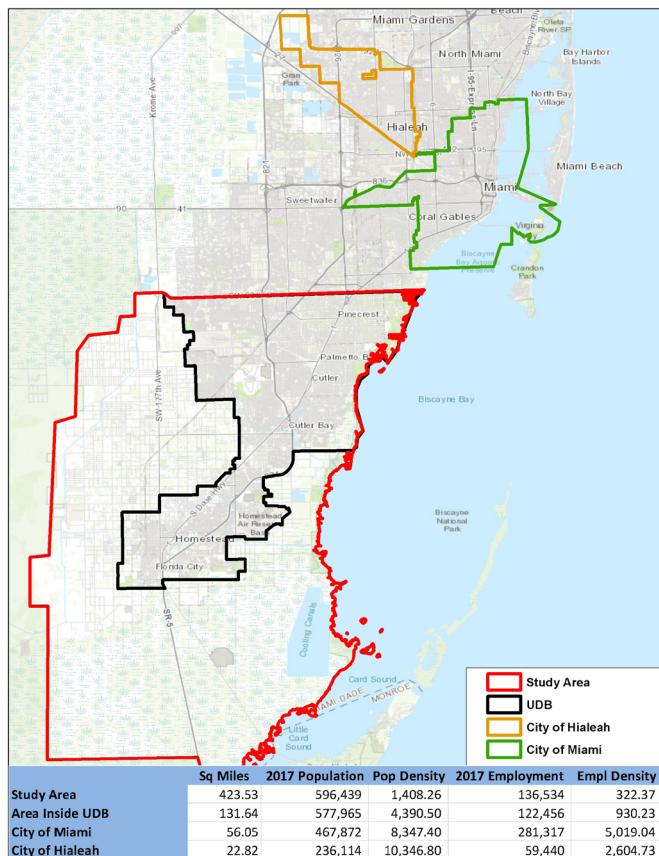


Figure 7: South Dade Job to Population Density vs. Large Cities in Miami-Dade County
Source: US Census Bureau

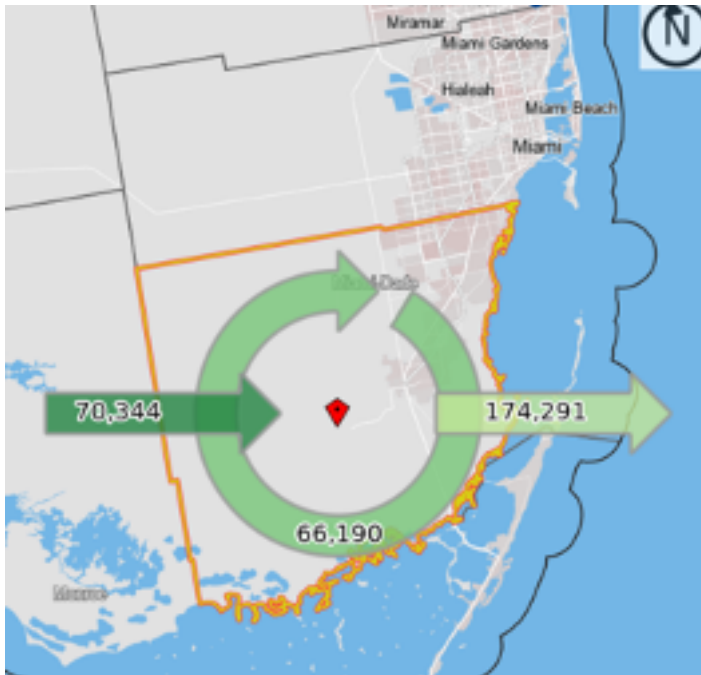


Although population growth has been and will continue to be robust for the foreseeable future, South Dade is not generating the jobs to support its resident base when compared to other areas of the county.

While both population and employment densities in South Dade are lower than more urbanized areas of the County, employment densities in South Dade when compared to South Dade population has a particularly large gap when compared to other urban areas of the County as the following map in Figure 7 indicates. Indeed, compared to the County overall, and despite similar age and family size profiles, **South Dade has approximately ½ the number of jobs per resident when compared to the entirety of Miami-Dade County.**

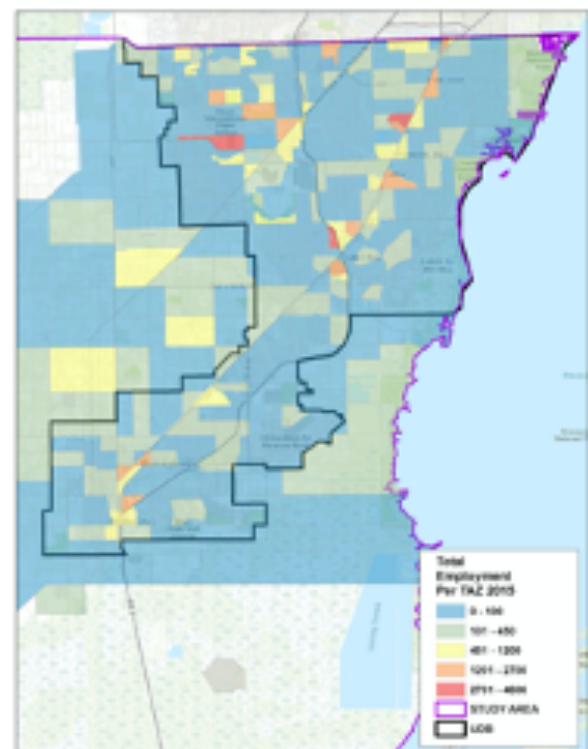
Given the relative low ratio of South Dade jobs to population, it should not be surprising that many residents of South Dade leave the region every day to travel to work. There are 240,500 workers who live in South Dade but 72% of work outside of South Dade. However, South Dade does attract workers from outside the region primarily to serve the large employers within one mile of Kendall Drive. In 2017 there were 70,300 workers who lived outside South Dade but traveled to work in South Dade every day, 66,200 workers live and work in South Dade.

Figure 8: South Dade Job Inflow/Outflow 2017
Source: U.S. Census; BEA



As the following map indicates, intra-regionally, employment is reasonably well spread with several areas around major nodes (i.e. Baptist Hospital, The Falls) having a high workforce concentration.

Figure 9: South Dade Concentration of Workers by TAZ
Source: Miami-Dade TPO



While South Dade is certainly a region of small businesses, rapid business growth in the region is likely to be driven in part by the expansion and attraction of large companies that rely on smaller businesses in the area. In order to get a better sense of the concerns of these large businesses we conducted an assessment of the 50 largest employers in the region and surveyed these employers, the responses of which have helped guide several of the recommendations in this plan. In summary as it relates to the largest employers in South Dade:

The 50 largest private employers in South Dade account for 16 percent of the total employment in the region.

The largest, Baptist Health Care has 3,000 workers, while the 50th ranked employer in South Dade is The University of Miami with 193 workers in the South Dade region despite the fact that UM is actually the single largest non-governmental employer countywide.

Retailers, including the recently closed Bloomingdale's at the Falls rank among the largest employers in South Dade. The importance of the transition of these spaces to other businesses is important to maintaining employment in South Dade and ensuring that the large spaces these retailers occupy in malls are transitioned to new businesses which both help maintain the employment base on the one hand and support the continued health of these large retail centers on the other.

The industries represented among the 50 largest employers are quite diverse and include industries at all wage classifications. These include Health Care, Food Service and Retail, Insurance, Professional Services, Tourism and Agriculture which are designated as emerging and traditional industries within this plan.

Overall, the largest employment industries in South Dade are retail and health care/social assistance with over 20,000 workers each, followed by Finance, Insurance, and Real Estate (FIRE) as well as Accommodations/Food Service and Professional Services with between 10,000 and 20,000 employees each.

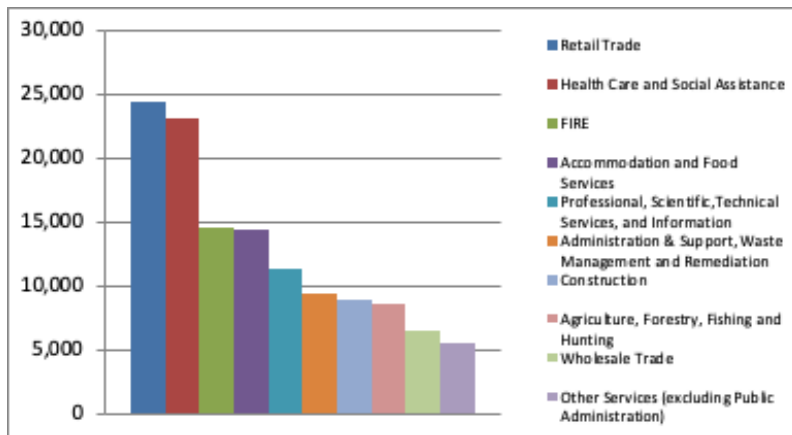
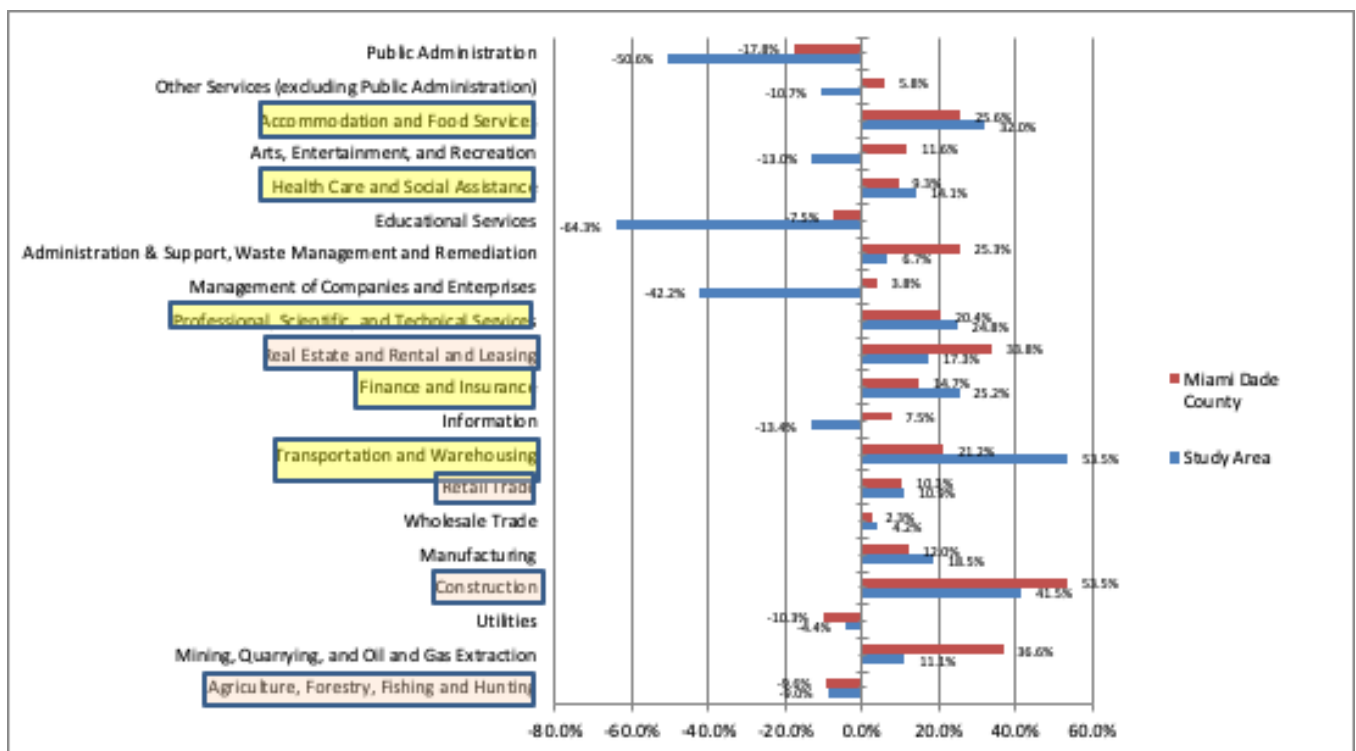


Figure 10: Ten Private Industry Sectors with Most Employment (2017)
Source: U.S. Census; BEA

The graph below (Figure 11) indicates the growth in employment by sector for the county as a whole in comparison to South Dade. Sectors where South Dade's growth outpaced that of the county's are highlighted in yellow, while sectors which are traditional industries in South Dade but have seen slower than countywide growth are highlighted in pink.

Figure 11: 2011-2017 Employment Sector % Growth/Loss
Source: State of Florida; U.S. Census



The table on the following page (Figure 12) provides the State of Florida's employment projections by Industry for Miami-Dade County as a whole between 2019 and 2027. Subarea projections are not produced by the State, but what stands out from these estimates is that a number of the strongest growth industries in South Dade in the past that outpaced the county as a whole as evidenced by the graph above (Figure 11) are expected to be among the fastest growing industries through 2027 countywide (highlighted in yellow). This provides a strong indication and basis to help define the targeted emerging industries for the South Dade region for the foreseeable future. Other data also is indicative of the need to support several traditional industries (i.e. Agriculture, Public Administration/ Defense, Retail) given the relatively modest or negative growth projected by the State countywide.

Figure 12: Miami Dade County Employment Projections by Sector (2019 to 2027)

Source: State of Florida

Employment				
Industry	2019	2027	Growth	Percent Growth
Total All Industries	1,292,693	1,389,390	96,697	7.5
Agriculture, Forestry, Fishing and Hunting	8,410	8,413	3	0.0
Mining	517	531	14	2.7
Construction	53,079	57,314	4,235	8.0
Manufacturing	41,604	41,221	-383	-0.9
Wholesale Trade	73,949	75,591	1,642	2.2
Retail Trade	149,877	157,041	7,164	4.8
Transportation and Warehousing	76,800	84,089	7,289	9.5
Information	20,355	19,829	-526	-2.6
Finance and Insurance	51,512	53,793	2,281	4.4
Real Estate and Rental and Leasing	28,993	31,261	2,268	7.8
Professional, Scientific, and Technical Services	85,317	97,214	11,897	13.9
Management of Companies and Enterprises	10,471	11,624	1,153	11.0
Administrative and Support and Waste Management and Remediation Services	91,289	99,700	8,411	9.2
Educational Services	36,120	40,047	3,927	10.9
Health Care and Social Assistance	153,136	175,318	22,182	14.5
Arts, Entertainment, and Recreation	16,587	17,417	830	5.0
Accommodation and Food Services	128,045	138,937	10,892	8.5
Other Services (except Government)	43,155	45,402	2,247	5.2
Government	143,175	147,895	4,720	3.3
Self Employed and Unpaid Family Workers, All Jobs	77,879	84,579	6,700	8.6

Miami-Dade County Public Schools

- K-8 Centers – 24
- Elementary Schools – 53
- Middle Schools – 17
- Senior High Schools – 12
- Combination - 2
- Alternative/Specialized Centers – 6

Private Schools

- Gulliver
- Palmer Trinity
- Westminster Christian
- St. Thomas Episcopal
- Montessori
- Charter High Schools – 10

Higher Education

University of Florida Tropical Research and Education Center (TREC) - mission is to develop solutions for Florida farmers by applying trade policy analysis and related production and marketing issues.

Florida International University - FIU, Zoo Miami and the Zoo Miami Foundation are teaming up to expand conservation research opportunities for undergraduate college students.

Miami Dade College Kendall and Homestead Campuses – A full range of educational programs. In addition, to academic programs that include entertainment technologies, nursing, and the arts and sciences, the Homestead Campus is home to the Eig-Watson School of Aviation.

Based upon the data analytics in the Background to the Market section of this report, the table on the following page (Figure 14) details three growth employment scenarios by industry for South Dade between 2019 and 2027. The first scenario is if South Dade continues upon its current path of growth while Scenario B and C are indicative of enhanced growth as a result of the implementation of a focused South Dade regional economic development strategy. While nobody can guarantee the success of the economic development initiative and strategies outlined herein, using the proprietary REMI regional input/output model we are able to estimate the relative economic and fiscal benefits associated with enhanced employment growth and mitigation of employment loss for traditional industries in the region. This analysis in turn provides a basis and rationale for making the modest investment in economic development called for in this Plan given the relative high fiscal and economic returns which may result. The outcomes of the REMI model under the three scenarios outlined in Figure 14 on the following page are detailed in Section 7 of this plan. .

Figure 14: Employment Growth Scenarios Under Various Economic Development Strategies: No Intervention vs. Moderate to Significant Intervention

2017-2019	SCENARIO A BASELINE HISTORIC TREND	SCENARIO B MODERATE INTERVENTION	SCENARIO C SIGNIFICANT INTERVENTION
NAICS 2-Digit Employment Codes	New Jobs	New Jobs	New Jobs
Agriculture, Forestry, Fishing and Hunting	3	3	4
Mining, Quarrying, and Oil and Gas Extraction	2	2	2
Construction	690	690	690
Manufacturing	(68)	(68)	(68)
Wholesale Trade	274	274	274
Retail Trade	1,252	1,252	1,252
Transportation and Warehousing	398	547	802
Information	(70)	(70)	(70)
Finance and Insurance	519	769	1,026
Real Estate and Rental and Leasing	119	119	119
Professional, Scientific, and Technical Services	1,595	2,391	3,188
Management of Companies and Enterprises	-	-	-
Administration & Support, Waste Management and Remediation	300	300	300
Educational Services	-	-	-
Health Care and Social Assistance	4,690	7,021	9,361
Arts, Entertainment, and Recreation	-	-	-
Accommodation and Food Services	1,481	2,222	2,963
Other Services (excluding Public Administration)	-	-	-
Public Administration	482	482	482

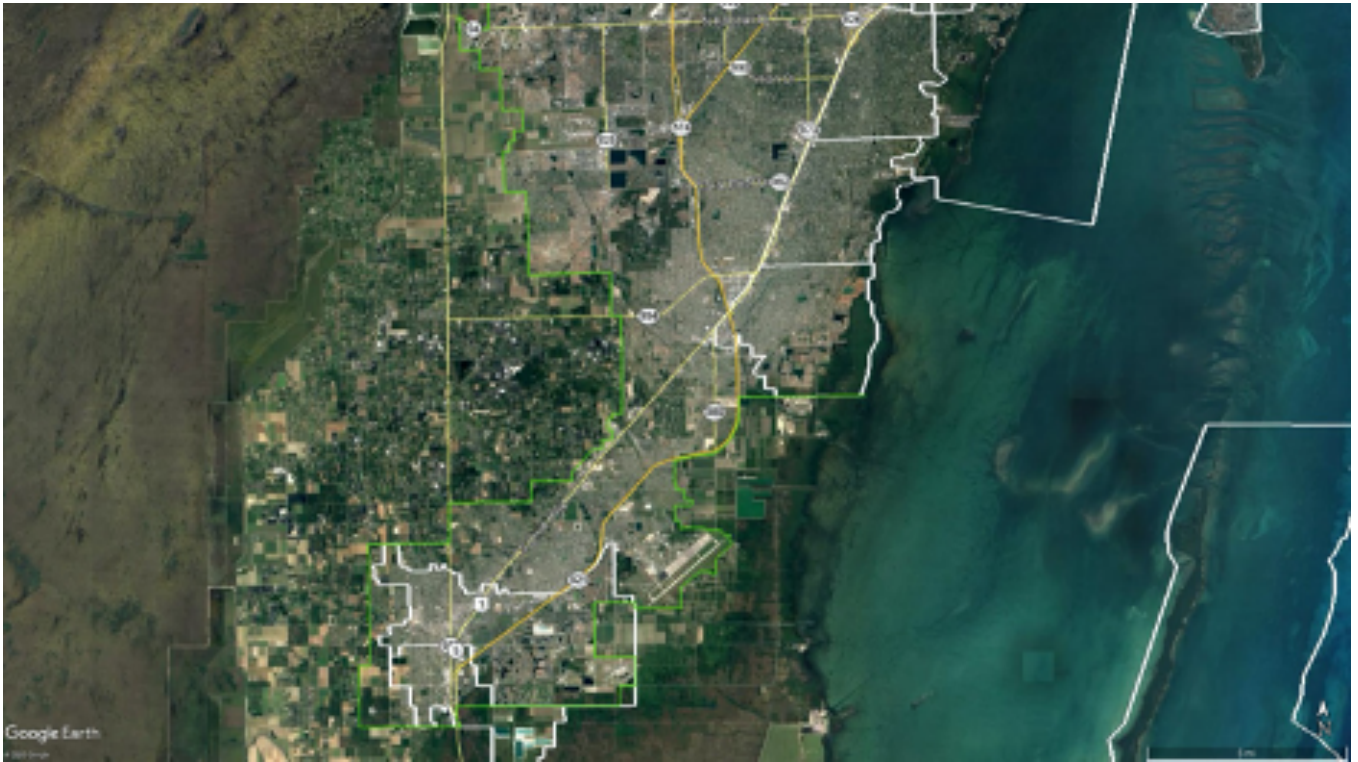
SECTION 4

OPPORTUNITY SITES EVALUATION AND RECOMMENDATIONS

In the preparation of the Strategic Plan for South Dade Economic Development, the plan reviewed and evaluated existing relevant policy plans and regulations for the purpose of determining how these policies may promote or constrain economic development opportunities in the study area. Subsequently, CGA provided recommendations regarding potential modifications that may be required to accomplish the desired project vision and goals.

To accomplish this the consultants reviewed municipal comprehensive plans and zoning codes as well as other studies and plans, and then examined and analyzed a list of sites located within the study area (defined by the area bound on the north by SW 88th Street (Kendall Drive) and to the west, south and east by the Miami-Dade County Urban Development Boundary (UDB) (Fig. 2). The sites were reviewed for their potential to be developed for either industry, office, service, retail, or mixed at a scale capable of generating potential concentrations of employment based on a variety of factors, including local policies and regulations.

Figure 15. Study Area



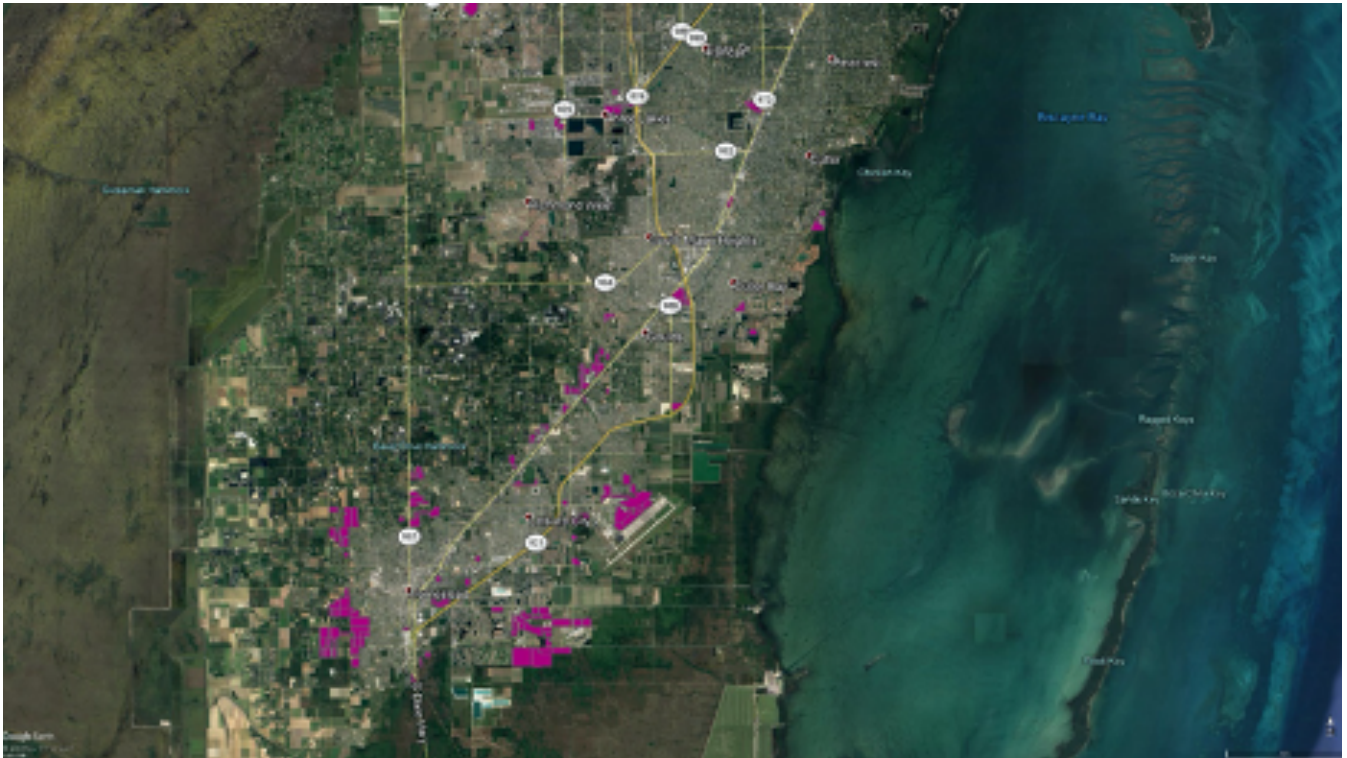
The review herein has been conducted at a high level and does not replace or supersede municipal review of potential development proposals on a site by site basis.

DATA

An initial list and mapped GIS files of over 200 sites scattered throughout the study area (Fig. 2) served as the starting point. All the sites were located within the UDB. The sites were identified and mapped using Miami-Dade County public property records and data from the Miami-Dade County Open Data Hub based on four factors:

- Location within the study area
- Privately owned
- Vacant
- At least 10 acres in land area

Figure 16. Initial Set of Potential Economic Development Locations



To refine the initial list of sites, a series of GIS data layers also obtained from the Open Data Hub were added including the following:

1) To the base map:

Municipal Boundary: <https://gis-mdc.opendata.arcgis.com/datasets/municipal-boundary>

Urban Development Boundary: <https://gis-mdc.opendata.arcgis.com/datasets/urban-development-boundary>

2) As data “filters”:

Wetland AOC: <https://gis-mdc.opendata.arcgis.com/datasets/wetland-aoc>

Highway: <https://gis-mdc.opendata.arcgis.com/datasets/highway> (Fig. 3)

Miami-Dade County Bus Routes: https://gis-mdc.opendata.arcgis.com/datasets/a33afaedf9264a97844080839a6f5ec9_0

Bus Stop: <https://gis-mdc.opendata.arcgis.com/datasets/bus-stop> (Fig. 4)

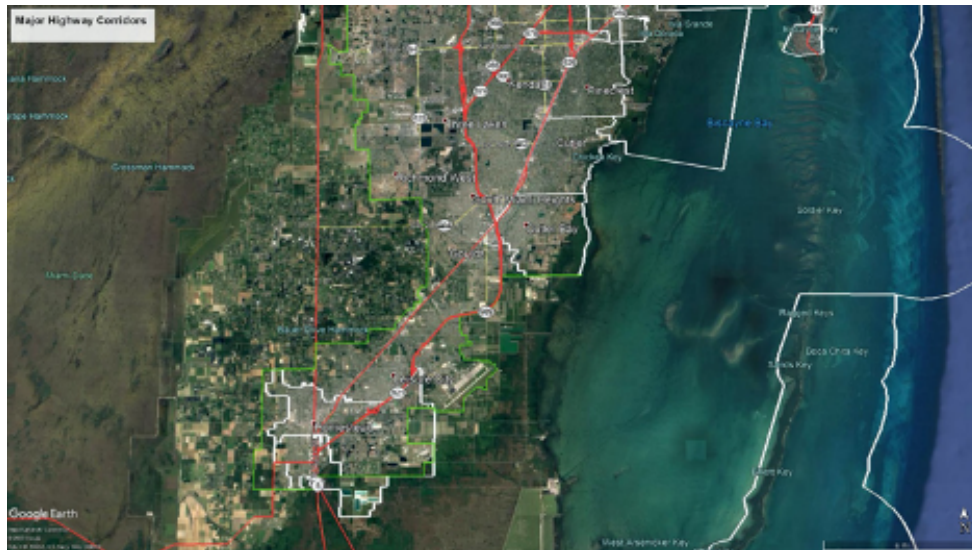
Existing Land Use: <https://gis-mdc.opendata.arcgis.com/datasets/land-use>

Future Land Use: <https://gis-mdc.opendata.arcgis.com/datasets/municipal-future-land-use>

Municipal Zone: <https://gis-mdc.opendata.arcgis.com/datasets/municipal-zone>

County Zoning: <https://gis-mdc.opendata.arcgis.com/datasets/county-zoning-1>

Figure 17. Major Highway Corridors

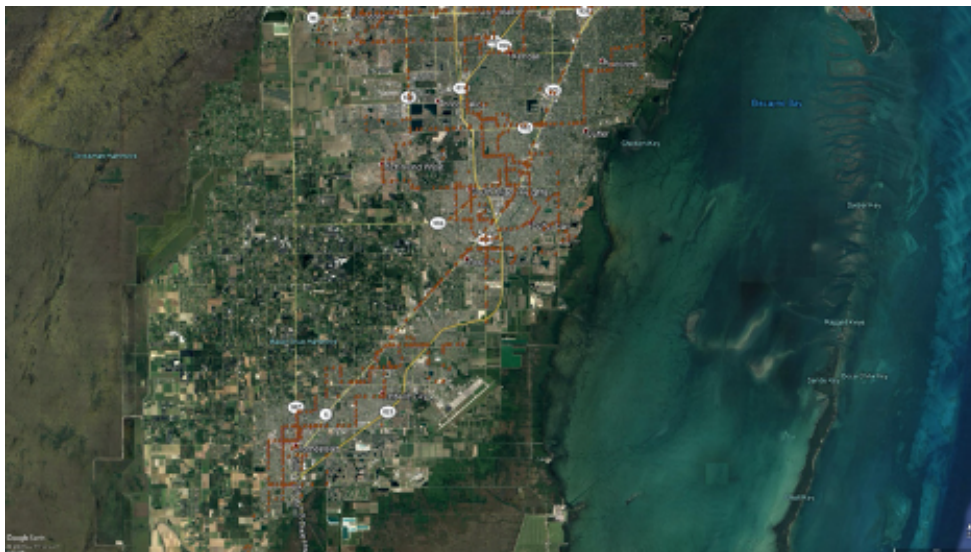


Analysis

<https://gis-mdc.opendata.arcgis.com/datasets/historic-site>

<https://gis-mdc.opendata.arcgis.com/datasets/historic-district>

Figure 18. Location of MDC Bus Stops



In addition, in the absence of municipal government infrastructure service maps, the following layers were used to generally infer the current absence or presence of central public infrastructure, and of potential, planned or ongoing capital infrastructure improvement which could positively impact the suitability of a site for future development:

DOH Septic System: <https://gis-mdc.opendata.arcgis.com/datasets/doh-septic-system> (only new OSTDs or repair to existing OSTD permits) (Fig. 5)

DOH Well Permit: <https://gis-mdc.opendata.arcgis.com/datasets/doh-well-permit> (only new wells or repairs to existing well permits) (Fig. 6)

DTPW - Capital Improvement – Sewer: <https://gis-mdc.opendata.arcgis.com/datasets/dtpw-capital-improvement-sewer> (Fig. 7)

DTPW - Capital Improvement – Water: <https://gis-mdc.opendata.arcgis.com/datasets/dtpw-capital-improvement-water> (Fig. 8)

Figure 19. Active OSTDs Permits

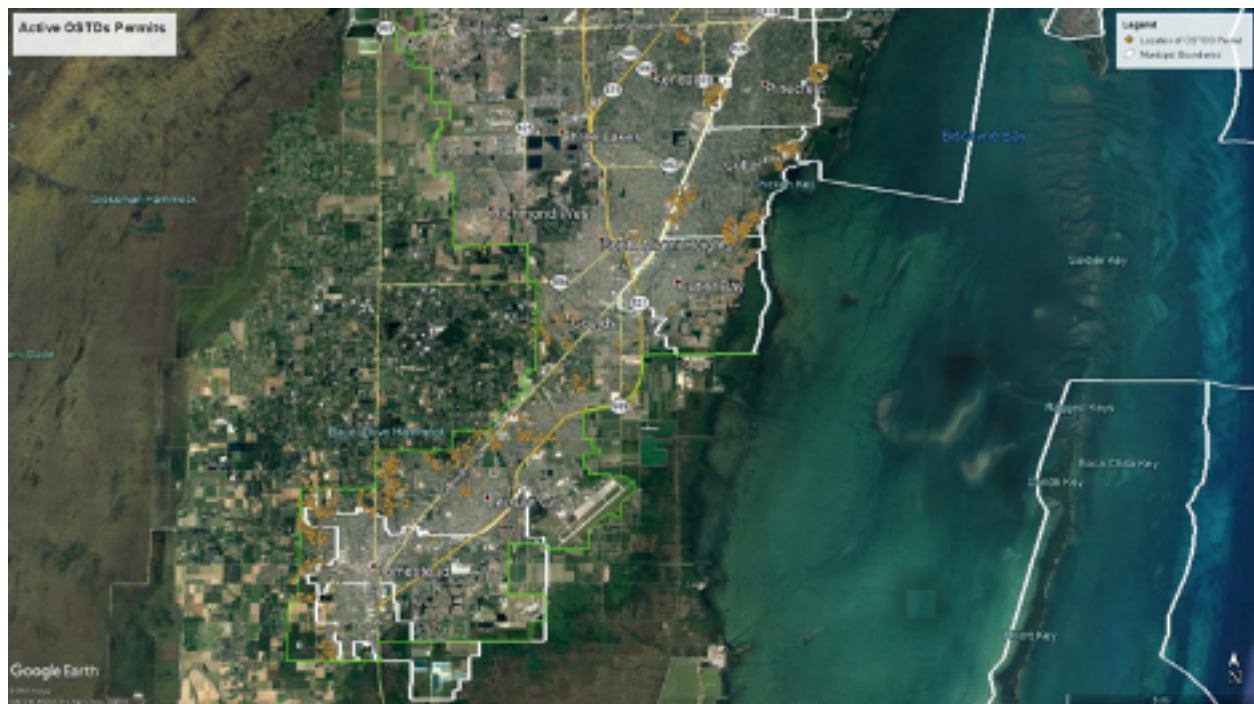


Figure 20. Active Water Well Permits

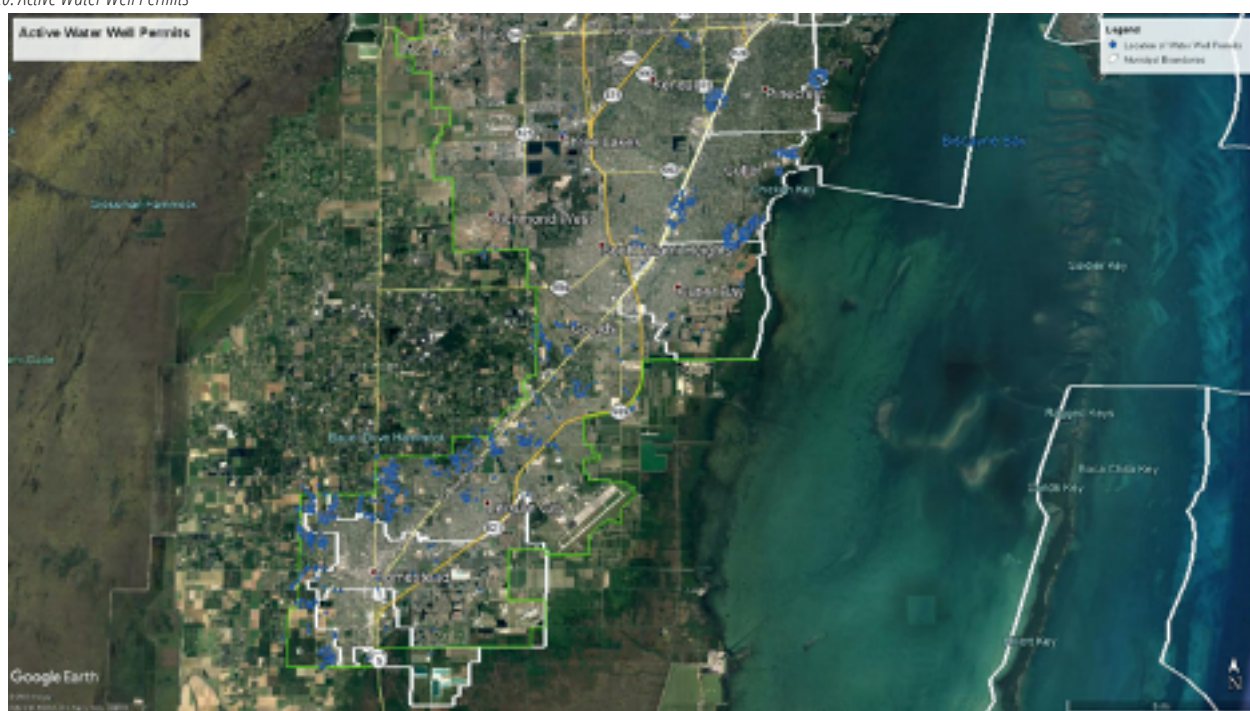


Figure 21. Ongoing and Planned Capital Improvements – Sewer

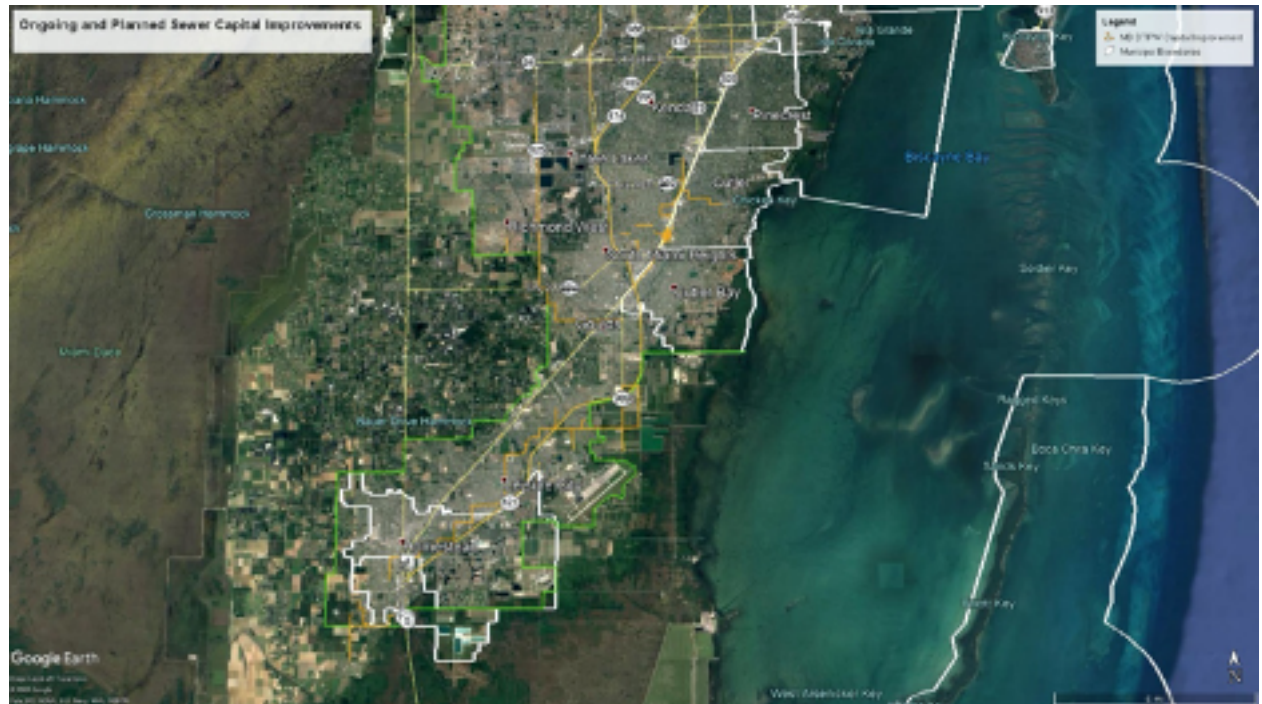
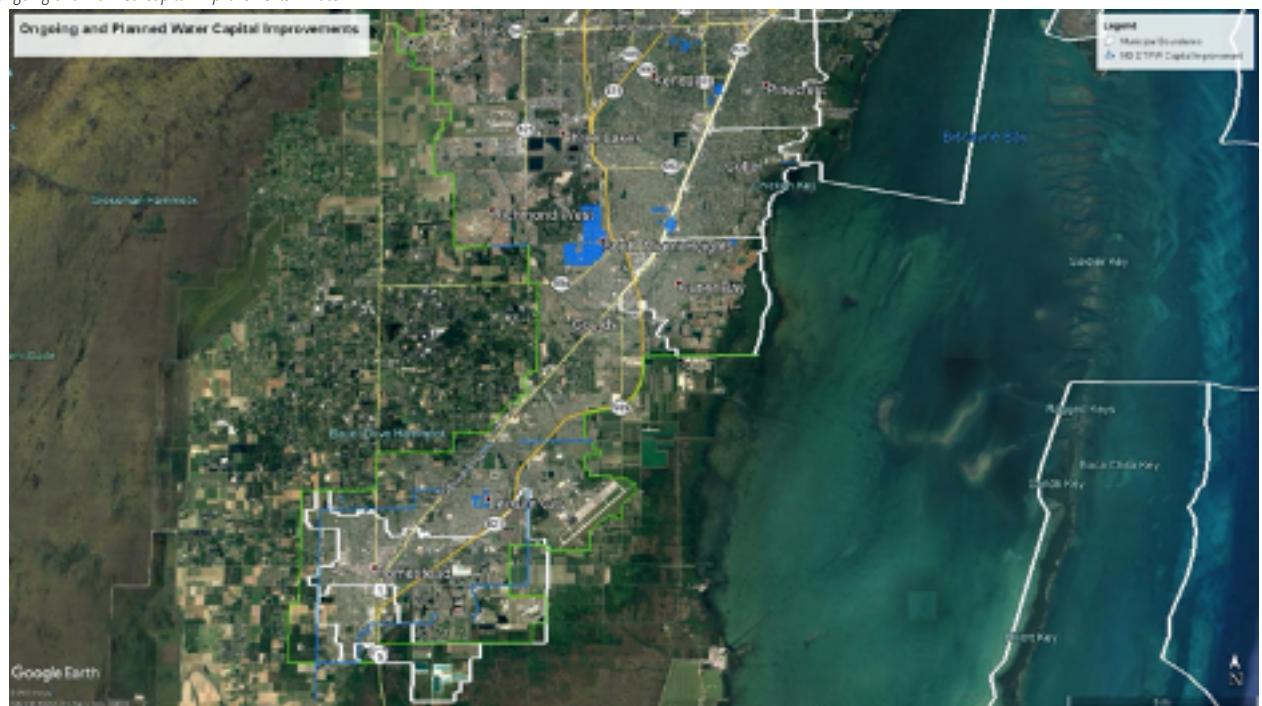


Figure 22. Ongoing and Planned Capital Improvements - Water



It is worth noting that these data do not in any way indicate traffic, water or sewer infrastructure capacity. Additional consultation with each municipality and localized study of individual sites is recommended in the future.

To supplement our understanding of this and other topics related to the site “suitability” analysis, CGA also reviewed the following information:

Municipal Comprehensive Plans, Future Land Use Maps and Zoning Maps

SMART Plan South Dade Transit Corridor Land Use Scenario and Visioning Planning Report dated 10/10/19 and produced by CGA). The locations of recommended future BRT stops from this and related studies were added to the map as well.

METHODOLOGY

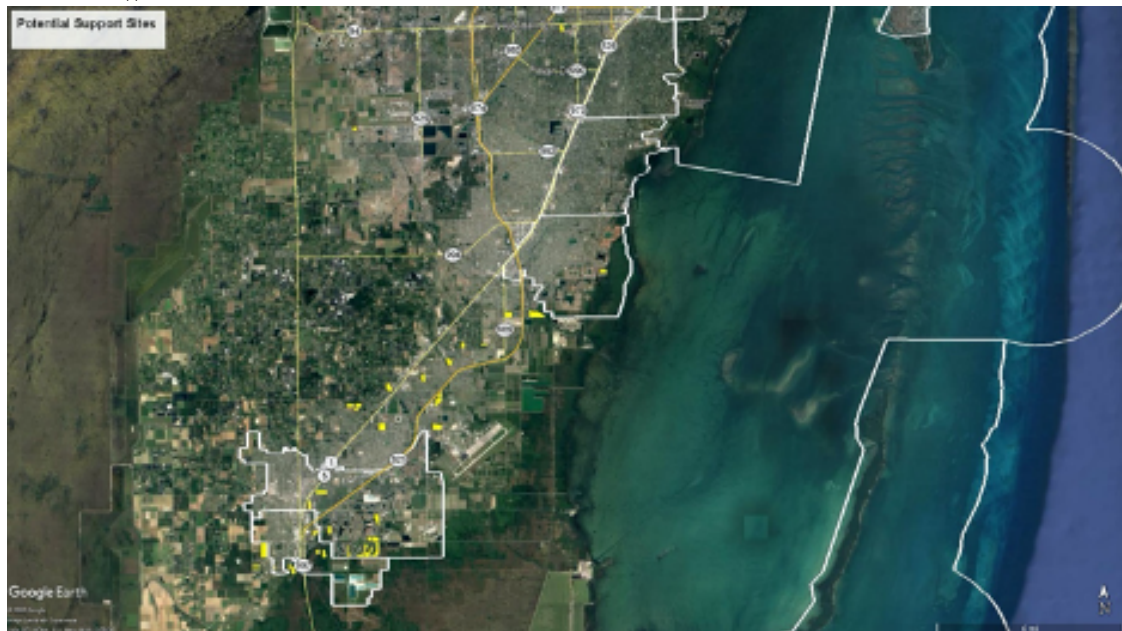
For functionality purposes (given the large amount of data being used) the base map and initial sites layer were imported, as well as the additional GIS layers obtained from Miami-Dade County Open Data Hub as a .kmz format project file into Google Earth Pro. This allowed the team to manipulate the layers and zoom in to examine conditions at a variety of scales.

By doing this, the team was able to immediately eliminate a number of sites which, upon further examination of the property records, were found to be publicly owned (e.g., rights of way), as well as sites which were identified as properties that may contain wetlands according to the Wetland AOC layer from the Open Data Hub.

Likewise, a visual sweep eliminated some sites presently developed with economic development activity (industrial, office or commercial) but which are not likely redevelopment sites, as well as any site found (through knowledge of municipal approval activity) already committed for development or redevelopment.

In addition, sites were set aside that were found to be located amid existing residential neighborhoods and designated in the local Future Land Use and Zoning maps as residential sites. These were relocated to their own layer within the .kmz file and identified as potential residential support sites, because they (along with others not included in the initial list) could be encouraged to be developed for workforce and other housing to support economic development at the local and regional level. A map of the potential residential support sites is displayed in Figure 23.

Figure 23. Potential Residential Support Sites



New sites were also added to the list, including several recognized in municipal comprehensive plans or other local studies as targeted redevelopment sites, or sites that were similarly identified in the SMART Plan South Dade Transitway study as potential transit-oriented mixed-use employment centers.

The team subsequently identified, categorized and allocated magnitude to the different criteria against which the sites could be evaluated using on the data provided in the layers obtained from the Miami-Dade County Open Data Hub. The intent was to establish a simple point allocation system, filtered through the relative “importance” of each criterion or sub-criterion. This enabled the ranking of the sites based on the sum of their allocated points.

The evaluation criteria, with their assigned point system is detailed in the table on the following page.

Based on the point allocations and resulting rankings, the following point ranges were established in order to determine the tier assignments:

- High (30+ points) = Tier 1
- Medium (20-29 points) = Tier 2
- Low (> 20 points) = Tier 3

Figure 24. Criteria Ranking of South Dade Development Sites for Large Scale Economic Activity

Criterion	Sub-criterion	Points
1 - Infrastructure Availability	Infrastructure exists	12
	Infrastructure is or may be lacking but capital improvements are ongoing or planned	6
	Infrastructure is or may be lacking and no capital improvements are planned	1
2 – Highway Accessibility (for movement of goods) (Figure 25)	Highly accessible (within 0-1.0 miles of an access ramp to Turnpike, Palmetto, Don Shula or US-1)	10
	Accessible (within 1.0-3.0 miles of an access ramp to Turnpike, Palmetto, Don Shula or US-1)	5
	Low accessibility (more than 3.0 miles of an access ramp to Turnpike, Palmetto, Don Shula or US-1, or within 1 mile of a major intersection of Krome Avenue)*	1
3 – Site Vacancy	Vacant	5
	Not vacant	2
4 – Transit Access (for worker mobility) (Figure 26)	High transit accessibility (within ¼-mile from a busway stop or proposed SMART Plan stop, or multiple bus route stops)	4
	Low transit accessibility (more than ¼-mile from a busway stop or proposed SMART Plan stop; or access only to limited number of bus routes)	1
5 – Need for Land Assembly	No land assembly (single site, 10+ acres)	3
	Some land assembly (adjacent sites between 5-10 acres)	2
	Major land assembly (adjacent sites including sites >3 acres)	1
6 – Future Land Use and Zoning Designations	Suitable FLU and zoning are in place	3
	Suitable FLU is in place, but not zoning	2
	Suitable FLU and zoning are not in place but are amendable	1

*Krome considered low access until the completion of FDOT's ongoing Krome Avenue widening and related truck bypass project, which is expected to redirect truck traffic from Krome Avenue to US-1 along SW 312 Street (Campbell Drive), SW 336 Street (Davis Parkway) and SR 9336 (Palm Drive). These projects are anticipated to be completed in 2021.

Based on this point allocation system, the highest possible site score is 37 points and the lowest 12 points.

Figure 25. One-Mile Radius Buffer from Major Highway Access Points

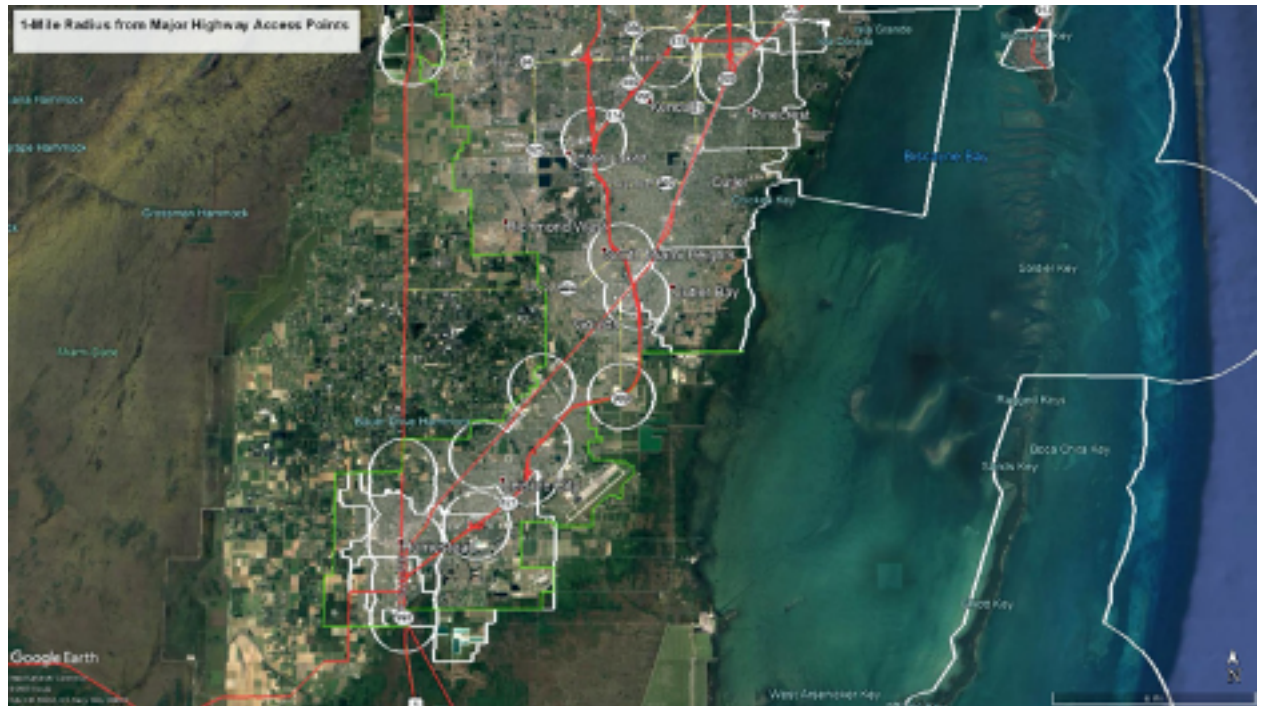
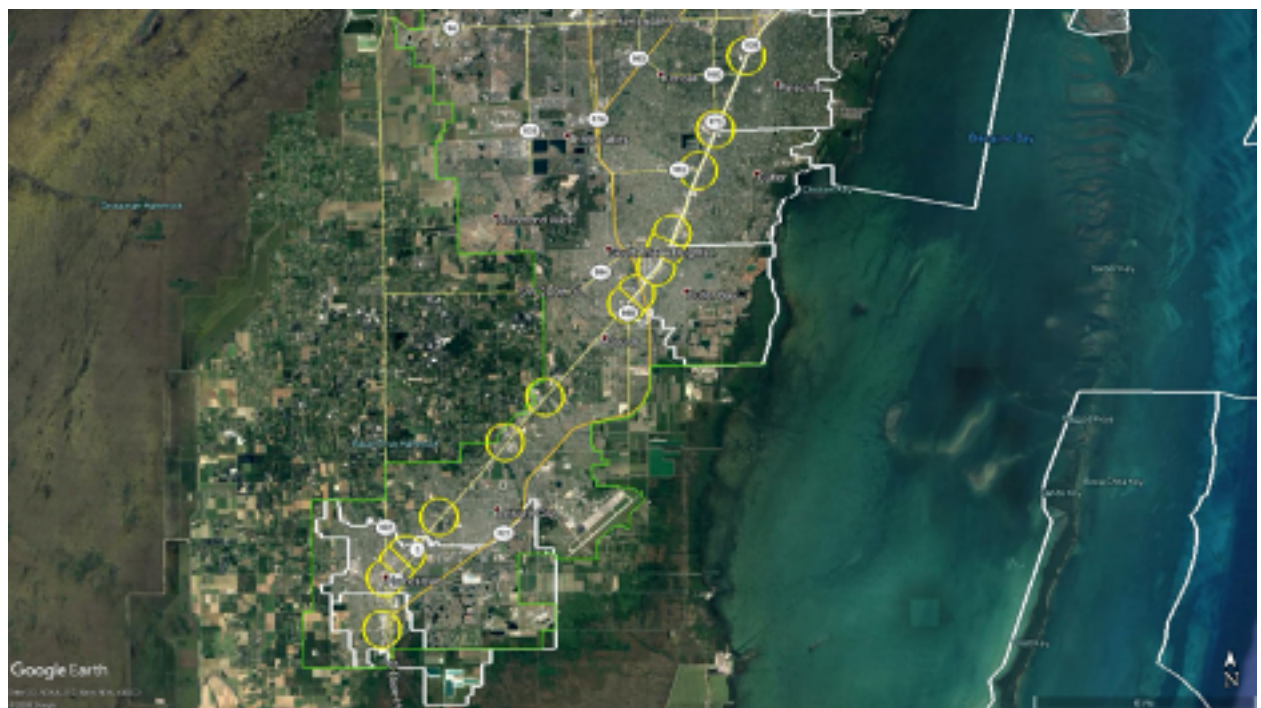


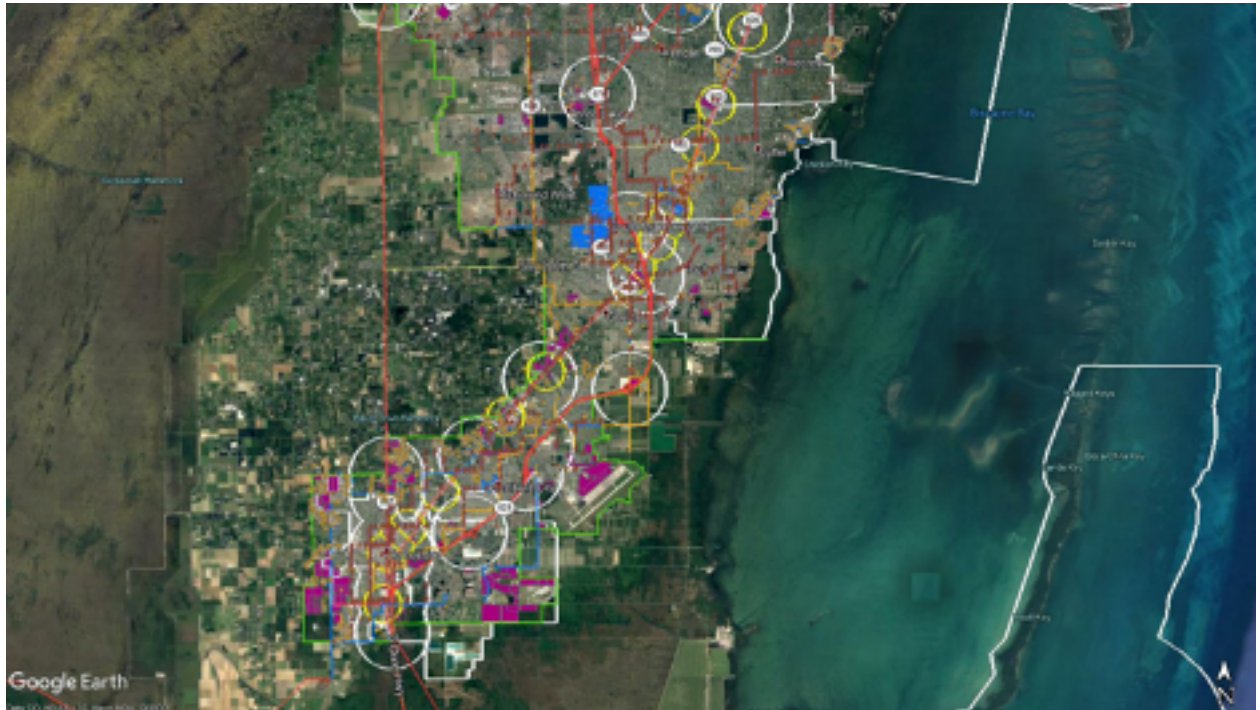
Figure 26. Proposed SMART Plan South Dade Transitway Transit-Oriented Station Areas



RESULTS

Although the original intent of this exercise was to narrow down the list of potential sites, CGA determined that utilizing this simplified adaptation of a multi-criteria decision and hierarchical analysis (Figure 27) allowed for the sites to be classified based on their comparative degree of “readiness” to accept economic development activity, and then be assigned to three “readiness” tiers without being dismissed altogether.

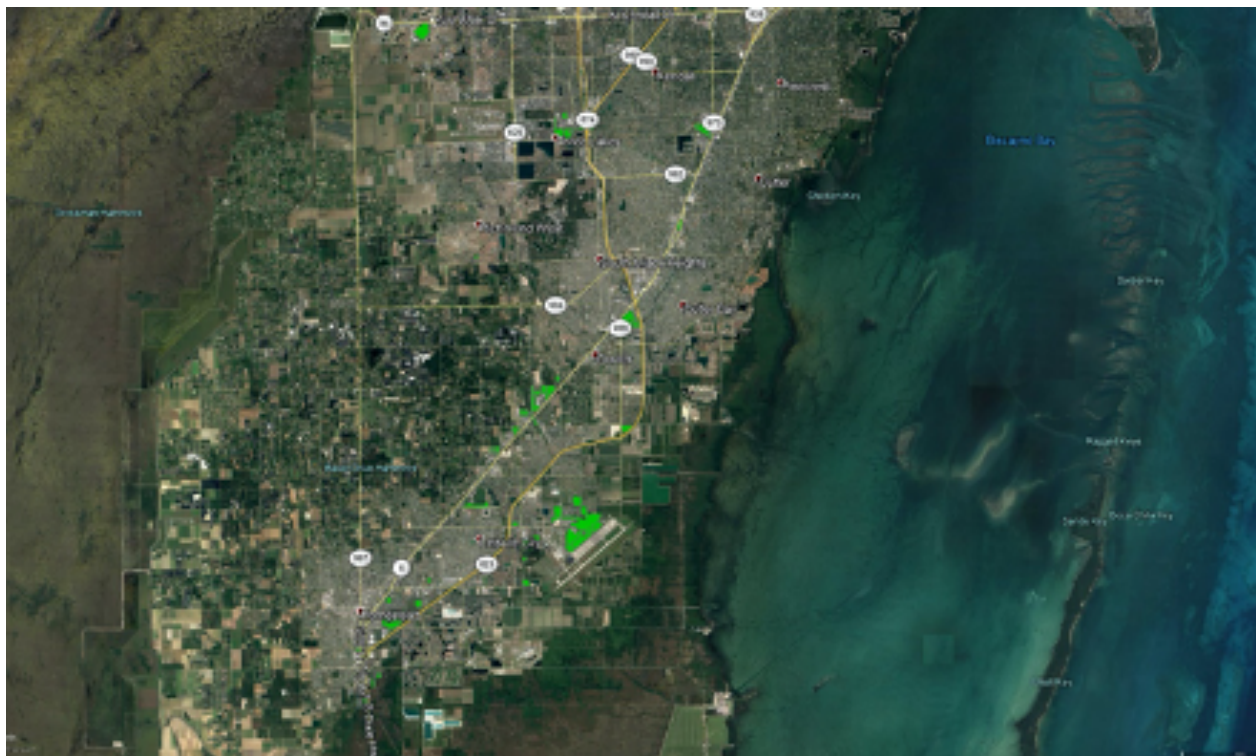
Figure 27. Composite Site Analysis Map



Thus:

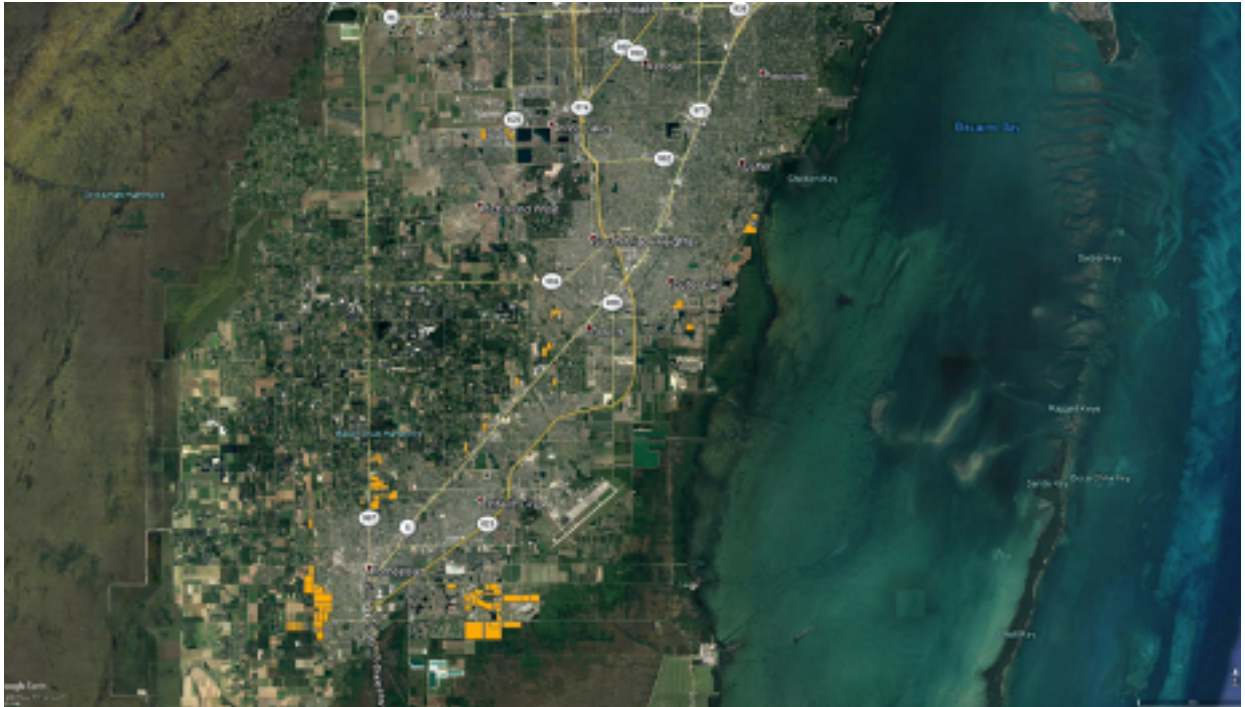
Tier 1: High rankings = Potential short-term or “low-hanging fruit” opportunities (“Economic development-ready”). These include mostly sites that are vacant or prime for redevelopment, where no land assembly is necessary, are well located relative to highway and transit access, with central infrastructure and economic development-friendly future land use and zoning designations (or if not, at least amendable). A map of the Tier 1 sites is shown in Figure 28.

Figure 28. Tier 1 Sites



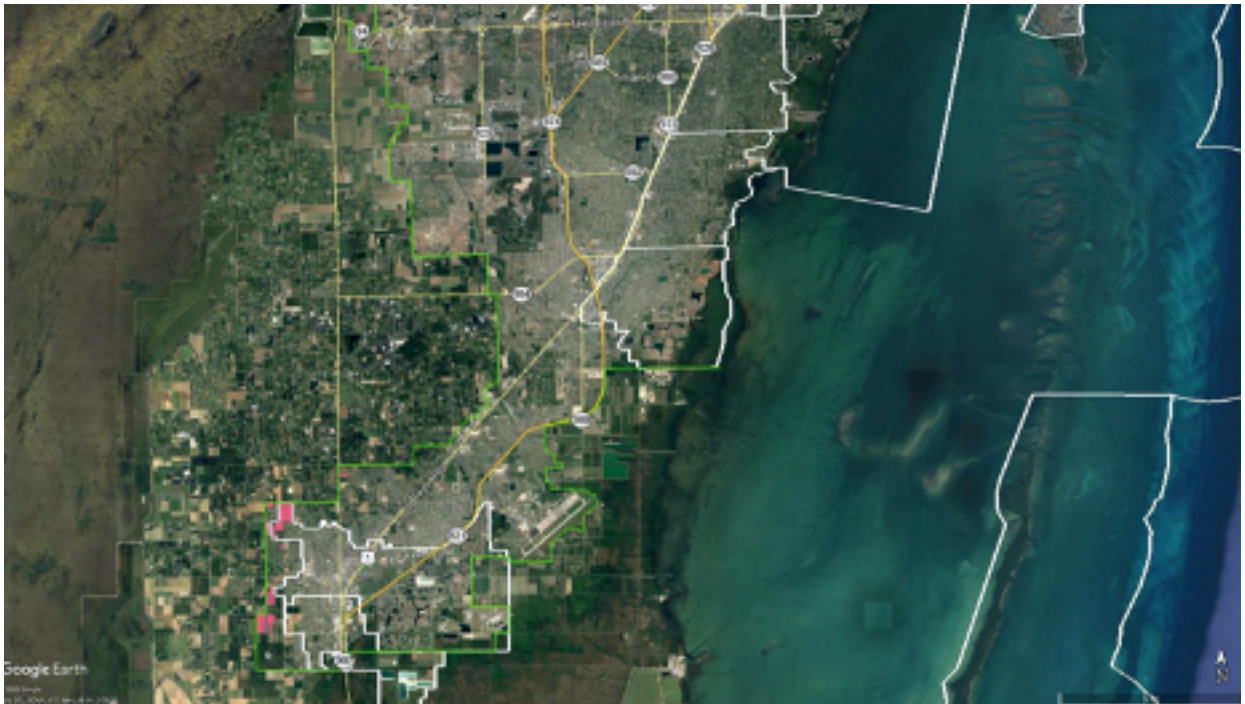
Tier 2: Moderate rankings = Potential mid-term opportunities. There are some possible combinations of criteria for these rankings but mostly this tier includes sites that are vacant. Some land assembly may be necessary though not in all cases. Typically, these sites seem to have good highway and transit access but may not have infrastructure in place today. However, there are ongoing or planned infrastructure improvements that may make the area more favorable for development in the future. The appropriate future land use and zoning designations may or may not be in place but may be easily amendable. A map of the Tier 2 sites is shown in Figure 29.

Figure 29. Tier 2 Sites



Tier 3: Low rankings = Potential long-term opportunities. Again, there are different combinations of points that can result in a low ranking, but generally the sites in this tier are not prime for development or redevelopment due to the need for major land assembly efforts, low highway and/or transit accessibility, no central infrastructure and no planned improvements in the foreseeable future, and future land use and zoning designations inconsistent with the purpose or not easily amendable. A map of the Tier 3 sites is shown in Figure 30.

Figure 30. Tier 3 Sites

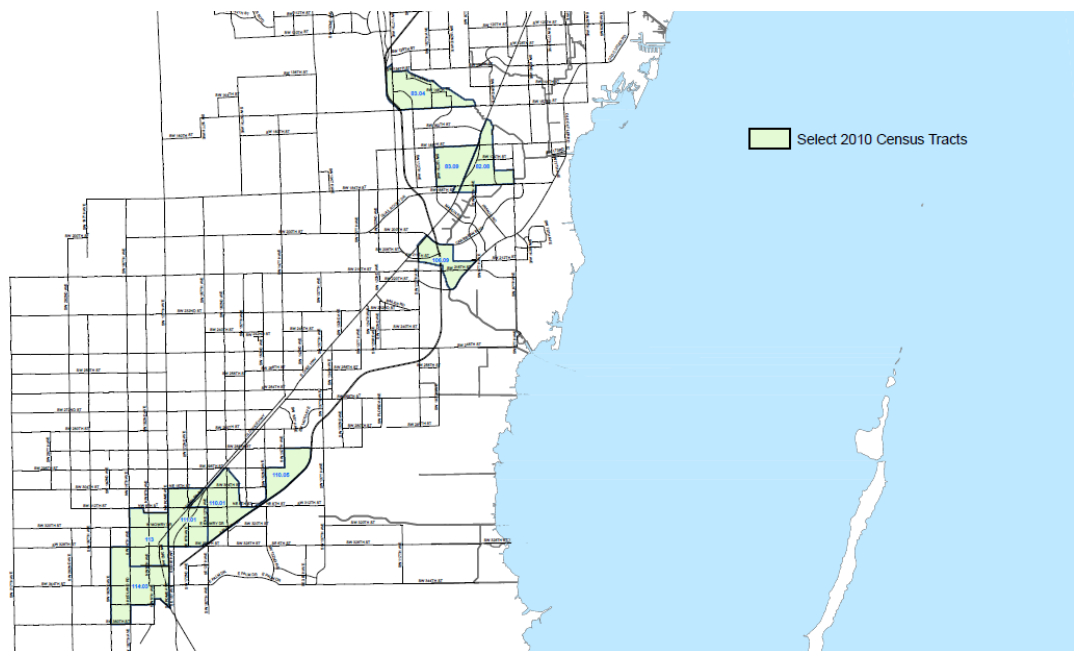


OPPORTUNITY ZONES

Although not factored into the ranking of potential sites, given that the Opportunity Zone program does not influence the suitability of sites for certain economic developments, the Zones can be an important tool in encouraging investment in an area where the underlying qualities, land use and positioning of a site is already appropriate.

An Opportunity Zone is an economically-distressed community where private investments, under certain conditions, may be eligible for capital gain tax incentives. Opportunity Zones were created to stimulate economic development and job creation, by incentivizing long-term investments in low-income neighborhoods. There are more than 8,760 designated Qualified Opportunity Zones (PDF) located in all 50 States, the District of Columbia, and five United States territories. Investors can defer tax on any prior gains invested in a Qualified Opportunity Fund (QOF) until the earlier of the date on which the investment in a QOF is sold or exchanged or until December 31, 2026.¹

Of the 67 Opportunity Zones that have been designated in Miami-Dade County, nine are located in the South Dade area as noted in the map below.



The zones are identified by their census tract number and are further described as:

Census Tract 83.04
Municipality: Village of Palmetto Bay
Tract Income Level: Moderate
Tract Population: 8910
Tract Minority Population: 95.97%

Census Tract 83.09
Municipality: Town of Cutler Bay
Tract Income Level: Moderate
Tract Population: 4445
Tract Minority Population: 97.17%

Census Tract 82.08
Municipality: Town of Cutler Bay
Tract Income Level: Middle
Tract Population: 4765
Tract Minority Population: 72.57%

Census Tract 106.09
Municipality: Town of Cutler Bay/
Unincorporated Miami-Dade
Tract Income Level: Moderate
Tract Population: 4676
Tract Minority Population: 84.04%

Census Tract 110.01
Municipality: City of Homestead/
Miami-Dade County
Tract Income Level: Moderate
Tract Population: 10717
Tract Minority Population: 94.53%

Census Tract 110.05
Municipality: Unincorporated Miami-
Dade county
Tract Income Level: Middle
Tract Population: 7042
Tract Minority Population: 92.53%

Census Tract 111.01
Municipality: City of Homestead/
Unincorporated Miami-Dade County
Tract Income Level: Moderate
Tract Population: 9260
Tract Minority Population: 92.56%

Census Tract 113
Municipality: City of Homestead
Tract Income Level: Low
Tract Population: 9438
Tract Minority Population: 97.12%

Census Tract 114.03
Municipality: City of Florida City
Tract Income Level: Moderate
Tract Population: 7050
Tract Minority Population: 85.15%²

1. <https://www.eda.gov/opportunity-zones/> 2. <https://www.ffiec.gov/census/report.aspx?year=2020&county=086&tract=0114.03&state=12&report=demographic>

All of the Opportunity Zones are located within the US 1 corridor with access to infrastructure, public transportation services and other public services. The Beacon Council has issued the Miami-Dade County Opportunity Zones Prospectus which contains information regarding financing, training and other partner organizations available to participate in the development process.

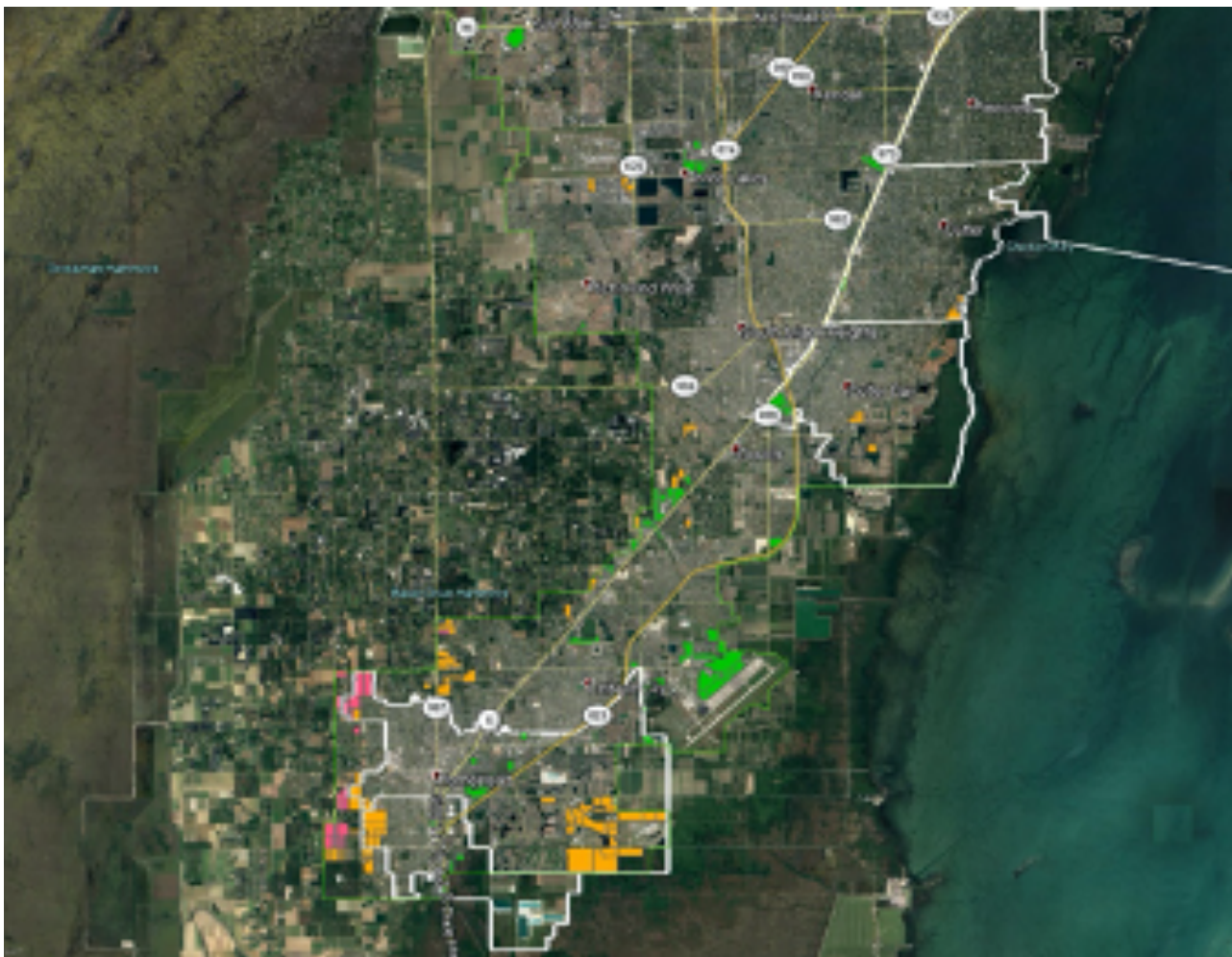
CONCLUSIONS AND RECOMMENDATIONS

The preceding is not an exhaustive analysis of every vacant or targeted redevelopment site in South Miami-Dade County. The sites were identified and evaluated in a fairly elementary manner, but the outcomes provide insightful “big picture” conclusions regarding areas of the South Dade region which offer potential for economic development activity through coordinated regional and local action. (Fig. 16)

The areas that present the most promise based on the criteria used for this analysis include locations in Palmetto Bay (The Falls), Cutler Bay (Southland Mall), Florida City, Homestead (including land surrounding the Reserve Air Force Base and the Speedway), and unincorporated Miami-Dade County including potential concentrations of sites adjacent to the historic communities of Princeton and Naranja. Both areas fall within Miami-Dade County-designated urban centers. Urban centers are overlay districts which supersede underlying land use designations and form the pattern of development, densities, intensities and uses. None of the sites identified are in Pinecrest, the northernmost municipality in the South Dade region.

The sites in The Falls, Southland Mall, Princeton and Naranja are also located along the South Dade Transitway Corridor and are identified as proposed locations for BRT stations and therefore suitable for transit-oriented economic development. We have sought to integrate the recommendations of the SMART Plan study for this corridor for those areas to the extent possible, and further suggest that other proposed station locations should also be considered for their economic development potential as part of the Strategic Plan.

Figure 31. Composite Tier Map



LAND USE POLICY RECOMMENDATIONS TO BEST ACCOMMODATE ECONOMIC DEVELOPMENT BY JURISDICTION

1. Village of Pinecrest

While none of the sites identified in our study are in Pinecrest (the northernmost municipality in the South Dade region), we reviewed its policy framework because the SMART Plan proposes a BRT station at the intersection of US-1/South Dixie Highway and SW 104th Street. The SMART Plan envisions an increase of more than 1,600 jobs within the station area as a result of development intensification at this location. The transit-supportive development, however, is anticipated to occur on the unincorporated portion of the station area (west of the transitway), since the Village's land use generally do not encourage the type of compact, vertically or horizontally integrated mixed-use development at intensities that would be transit-supportive.

2. Village of Palmetto Bay

There are two sites identified within the Village of Palmetto Bay's boundaries. One of the sites fall in Tier 1 and the other one in Tier 2.

The site in Tier 1 is on the South Dade Transitway and is on the edge a proposed BRT station area. It is part of the Village's designated Franjo Activity Center (FAC), where regulations are designed to encourage higher densities and intensities that will support transit-oriented development. The FAC has been experiencing significant change in recent years, and other sites within this activity center could be considered for additional economic development activity potential. The SMART Plan envisions adding about 1,400 jobs in this station area as a result of future transit-oriented redevelopment.

The site in Tier 2 includes vacant land within the Palmetto Village Center (the former Burger King headquarters). While this site is attractive for economic activity given the office and parking infrastructure already in place, it received a moderate ranking because it scored lower on highway and transit access criteria.

3. Town of Cutler Bay

There are 22 sites included in the list, but most of them are part of the Southland Mall area which falls in Tier 1. Southland Mall is part of the Town's Center District, which falls within one of the proposed SMART Plan station areas. The Town has been very proactive in preparing for transit-supportive development in this area. The sites include not just the mall itself but also several outparcels and the building that currently houses the Town Hall (which will be relocated as a result of the Town negotiating a land swap). The Town Center district encourages the redevelopment of the Southland Mall area with a high concentration of mixed uses at high densities and intensities.

The remaining identified sites include several large tracts of vacant land that are part of the Old Cutler Road Mixed Use Corridor and the Lakes by the Bay Mixed Use site. The former sites are well positioned for potential commercial and office activity but ranked moderately because of their score on the highway and transit accessibility criteria. The Lakes by the Bay site is surrounded by established residential neighborhoods. In this context, it is likely to be developed as a neighborhood-scale mixed-use development with a predominant residential component. Importantly, the future land use and zoning are in place for all of the sites identified in Cutler Bay.

4. City of Homestead

This study identified 38 potential sites within the City of Homestead. Many surround the Homestead-Miami Speedway (HMS).

The sites in the vicinity of the Speedway are owned either by HMS or the City of Homestead and are part of the Villages of Homestead Development of Regional Impact (VOH DRI) originally approved in 1975. These sites ranked moderately (Tier 2) due to lower scores against the highway and access criteria.

The list of sites in Homestead includes several scattered sites that ranked high (Tier 1) on most categories; some are adjacent or near to the Turnpike Extension. However, only one of the sites identified is within a proposed SMART Plan BRT station area. The SMART Plan identified three potential station locations with land within the City of Homestead: at SW 312th Street/Campbell Drive (old Homestead City Hall site); at Miami-Dade College; and at SW 177th Avenue/Krome Avenue (straddling into the City of Florida City). The SMART Plan vision for these three station areas, if realized, could add more than 8,000 new jobs in Homestead and Florida City. The new development and redevelopment sites within the proposed station areas should be considered. The City of Homestead has a variety of future land use designations and zoning categories that may be considered economic development friendly.

There are also several sites located in the northwestern and southwestern sectors of the City that are classified as either Tier 2 or Tier 3 sites. This is mostly due to a present lack of infrastructure, but some of these sites are in the path of planned infrastructure.

5. City of Florida City

There are 12 sites identified as being within the boundaries of Florida City. Aside from four Tier 1 sites located either within or adjacent to a proposed SMART Plan BRT station area, the remaining eight sites are Tier 2 sites at the western edge of the City. These sites currently lack adequate infrastructure and appropriate future land use and zoning designations, but ongoing or planned infrastructure improvements may make these sites more attractive for development in the long-term future.

Florida City is the third oldest municipality in Miami-Dade County. The City's Comprehensive Plan is due for an update, particularly because consistency between the Future Land Use Map and the Zoning Map is weak.

The Florida City Comprehensive Plan is the only one aside from Miami-Dade County's to include an economic development element, but the plan is overdue for an update. Consistency between the Future Land Use Map and the Zoning Map is weak, and the categories where economic development activity could occur, such as Urban Activity Center, are not designated in the Zoning Ordinance or Zoning Map.

6. Unincorporated Miami-Dade County

Most of the sites (127) on the list are in unincorporated Miami-Dade. They are dispersed throughout the study area but grouped within those scattered areas.

Of the 127 sites, 57 of them fall in Tier 1. Many of the Tier 1 sites are near or adjacent to the Homestead Air Reserve Base (HARB). The Falls shopping Center, located at the intersection of SW 136 street and US 1 is a potential hub for future redevelopment especially as it lies at the nexus of the Village of Pinecrest, the Village of Palmetto Bay and unincorporated Miami-Dade County. With the loss of Bloomingdale's as its anchor at the eastern end of the center, the shopping center is reinventing itself to be a more community oriented and more inclusive of local shops and services. The former Bloomingdale's building will be razed and replaced with a Life Time Athletic Resort and Spa which will be about 60% of the size of Bloomingdale's. Slated to open in 2022, the club operates as a "modern country club" with amenities including dining, spas, and classrooms, in addition to upscale workout facilities.

HARB is a major economic force, ranking as the second largest employer in the South Dade region. These sites ranked high (Tier 1), however, land uses in the proximity of HARB are required be compatible with the operation of a Defense installation pursuant to Section 163.3177(3)(a), Florida Statutes. There are location and height restrictions based on noise contours and flight paths to consider.

Several other groupings of Tier 1 sites are (as mentioned previously) in or adjacent to the designated Urban Centers of the historic communities of Naranja and Princeton, which have regulations that encourage development and redevelopment suitable for economic development purposes.

Further, two of the proposed SMART Plan BRT stations are located at the core of these Urban Centers. Identified sites are within the boundaries of the station areas. The SMART Plan vision for the Princeton station area projects a potential increase in jobs here of nearly 2,500. In Naranja, the SMART Plan projects a potential increase of more than 2,200 jobs. Both areas have land use capacity for significantly higher numbers based on the future land use and zoning.

There is also a Tier 1 opportunity site in Naranja Lakes adjacent to the future Larkin Health Sciences Campus.

The SMART Plan study indicates that there is a significant imbalance in the residents-to-jobs equation in this part of the South Dade Transitway corridor (4:1 ratio versus 2:1 in the County as a whole). One of the goals of the SMART Plan is to create more balanced land uses.

In the northern, West Kendall portion of the study area, there is a smattering of large Tier 1 opportunity sites in the Three Lakes area (north of Zoo Miami). Several of the sites are owned by FPL. These and the adjoining privately owned sites are conveniently located adjacent to existing industrial areas and easily accessible to the Turnpike Extension and the Don Shula Expressway.

Several sites adjacent to the Kendall-Tamiami Executive Airport are in Tier 2, primarily for scoring slightly lower against the highway and transit access criteria. In addition, it was not possible to obtain timely information regarding potential Airport land acquisition or expansion plans. Future development may be required to comply and be compatible with the zoning area restrictions for the Airport, as established in the Miami-Dade County Zoning Code.

We recommend continuing close coordination between the LEDO and Airport regarding implementation of economic development goals in these areas.

Finally, there are some significant groupings of sites deep in South Dade, bumping up against the edges of the UDB in the agricultural area of the Redland. These sites generally ranked low in Tier 2 or fall to Tier 3 due to lack of infrastructure, lack of accessibility and future land use and zoning designation. For these reasons, we see these sites only as potential very long-term reserve sites and believe they should not be considered at this time.

SECTION 5

GOALS, APPROACH AND ORGANIZATIONAL/IMPLEMENTATION CONSIDERATIONS

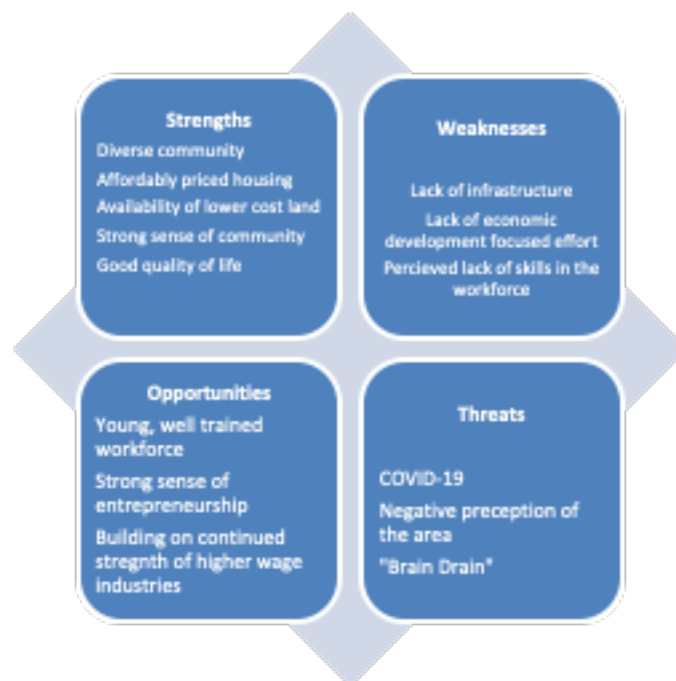
Through the process of developing a strategic plan for South Dade, the following questions provided guidance for the research that was conducted as part of the study as well as the information gleaned from the community meetings and industry conversations:

- How do we make South Dade a stronger community where more people can work and not only live and play?
- What industries should be targeted which create the greatest opportunity for growth both in terms of number of jobs and wages?
- How do we try to ensure that good jobs, means good jobs for people at every income level?
- What needs to be done to attract targeted industries?
- What is/are the organization(s) responsible for attracting and supporting the needs of companies within the target industries?

While prior sections of the plan have answered some of the questions above, the remainder of this Section, and Section 6 are aimed at providing the guidance on how each question is tackled and what the strategies to achieve objectives should be.

SWOT

Through interviews, review of prior work, etc. associated with the development of this South Dade Economic Development Strategy, we have been able to organize the opportunities and challenges facing the region into a series of Strengths, Weaknesses, Opportunities and Threats. Although these ideas have been gathered during a variety of brainstorming sessions that have been held in South Dade and have not been heavily driven by data, they do provide an indication of how the participants, including residents and business leaders from South Dade, perceive their community and what they foresee for the future.



VISION

Based on the multitude of input from South Dade residents and active participants in the varied sessions that have been held, a Vision Statement for the area has been developed which encapsulates the primary objective for the region.

A community where people desire to live, work and play; Where sustainability is a guiding principle and not an afterthought; Where the traditional industries of agriculture, Defense, health care, tourism, and retail can be maintained and otherwise thrive to the level which the global market allows; and, where establishing the foundation for newly emerging industries by making better use of existing and expanded infrastructure becomes a reality.

A core element of the discussion around economic development in South Dade for more than a decade has been the question of a need for a South Dade specific Local Economic Development Organization (LEDO)? Indeed, the implementation of this plan is contingent and organized around the establishment of a strong LEDO, built off of the foundation of the existing EDC but more appropriately funded and partnered with government and the private sector.

There is a natural tendency of large businesses from outside of the region to think of Miami as a highly urban center or airport centric region as it relates to the Latin American market and a subsequent logic to orient targeted business attraction efforts to the urbanized areas of the County as a result. South Dade is unique in a Miami Dade context given its mix of suburban and exurban areas. South Dade needs to target certain users/businesses that are seeking a business environment which South Dade offers which is often separate and distinct from the remainder of county

ORGANIZATIONAL CONSIDERATIONS

Additionally, South Dade's business community also requires an organization to advocate for its needs with government which are somewhat unique and include:

- Continued Infrastructure investment and expansion;
- Continued improvement to transportation network to drive growth rather than support existing demand;
- Providing a unique voice for the South Dade area which can lost given the size of the region; and,
- Specific focus and support for the Agriculture and Defense industries/communities which have long defined South Dade.

The LEDO can play a key role in identifying stakeholders, forging partnerships and engaging the wider community around the local economic development process. The organization is not necessarily organized with a membership component. Rather, the LEDO should work to coordinate with existing organizations and not compete with them for critical resources. The table below highlights the role of the LEDO in relation to other economic development entities.

Implementation Considerations

Who Does What?

Responsibility	South Dade Economic Development Organization/Business Community	County & Municipal Government	Beacon Council	Enterprise Florida & State	EDA & Regional Partners
Large Business Attraction & Retention	√		√	√	
Determine Qualifying Businesses for Incentives		√	√	√	
Provision of Incentives		√			
Infrastructure Investment		√		√	
Small Business Development Support	√		√		
South Dade Targeted Marketing Material	√				
South Dade Data & Information	√				
Local Industry Advocacy	√				
Funding of Economic Development Effort	√	√			√

The LEDO's role can range from that of a resource person who provides technical assistance and support - in communities where there is an existing strong local governance infrastructure - to being the key driver of the economic development process in communities where a strong catalyst is needed to bring about broad community and stakeholder engagement. Furthermore, the LEDO must be able to tap into knowledge of the local economy as well as knowledge of the wider national and international economic context.

The LEDO's primary role will be to foster and support productive relationships and effective partnerships. In an environment of limited time and resources, a LEDO's effectiveness is directly related to its ability to tap into professional and community networks for resources, advice, exchanges and partnerships. The LEDO will facilitate the process whereby communities identify and act upon economic opportunity. More than that, the LEDO will help build capacity within a community to find collaborative approaches to addressing economic and social challenges.

Figure 32 below details an initial proposed budget (2020 dollars) for the LEDO is detailed below and is organized around a staffing and services component which is adequate to broadly implement and support the economic development objectives and strategies outlined herein. Given the size of the budget, it is likely that a combination of private and County/municipal funding will be required.

Figure 32: LEDO Initial Budget (2020 dollars)

Executive Director	\$150,000
Assistant Office Manager	\$45,000
Business Attraction/Outreach Specialist	\$55,000
Benefits/Overhead	\$87,500
Office Rent	\$45,000
Legal/Accounting	\$40,000
Marketing/Public Relations	\$100,000
Research	\$60,000
Travel	\$12,000
Miscellaneous/Memberships	\$6,000
Total	\$625,000

The lasting impact of a LEDO's work is only partly reflected in specific projects or initiatives. The true legacy of the local economic development process is a stronger, more self-sustaining community that is able to problem-solve and implement innovative solutions to economic challenges beyond the life of specific projects or interventions.

Regardless of who is leading the process, it is vital that by the end of an initial orientation, participants including both public officials and private or community leaders, are able to fully understand and recognize local economic development as:

A strategy for wealth creation, jobs and income generation, and, ultimately, alleviation of poverty and improved quality of life.

A process that promotes self-help, empowerment, innovation, public-private-civil society sector collaboration, bottom-up planning, and, sustainable development incorporating environmental, social and cultural responsibility with economic development.

A potential contributor to the local governance authority's future revenue growth.

A purposeful and planned approach to pursuing economic transformation, which is an aspiration inherent in all local governance authorities or communities.

A good understanding of local economic development is needed for participants and community members to buy-in to the economic development process and fully cooperate with the strategic planning.

GOALS & OBJECTIVES

A rational economic development strategy and plan cannot be complete without tangible goals and objectives against which to measure success. Indeed, as it relates to economic development strategies the overriding goal is measured by the number of decent paying jobs which are created in sustainable and environmentally sensitive industries in the region. To this end, the plan includes the following goals and objectives:

In the immediate term, a core objective of the plan is to achieve recovery from the tremendous economic displacement caused by COVID-19, and under the assumption that a vaccine will be available in early 2021, that employment and business activity in the region recover to its year end-2019 levels by early 2024.

For those emerging industries or critical area industries detailed within the plan including Transportation and Warehousing, Finance & Insurance, Professional Services, Health Care and Accommodations & Food Service, the goal by 2027 is to increase the growth in number of jobs by a multiplier of 1.5 times the recent historic ratio of South Dade vs. countywide jobs for a specific industry. For example, assuming there are currently 2,000 jobs in South Dade in Industry A which is 20% of the County's 10,000 Industry A jobs; if the County's Industry A jobs grows by an additional 5,000 by 2027, then the goal for South Dade is that 1,500 of those jobs will be created in the region (5,000 new Industry A jobs x 20% historic South Dade fair share of Industry A jobs x 1.5 multiplier goal = 1,500 new Industry A jobs in South Dade).

For long term historic Target Industries, including Agriculture, Retail and Public Administration (Defense), the goal is to maintain South Dade employment at current levels through 2027.

Currently, approximately 175,000 residents of South Dade travel outside of the region every day for work. A secondary goal is to grow the ratio of workforce which lives in the region to work in the region. This has broad implications for improving mobility and quality of life for residents of the area.

A core goal and objective of this strategy is to promote general wage growth among South Dade workers both through the diversification of industries to traditionally higher wage industries but also by advocating for policies at the County, State and Federal level which create a level living wage playing field which is rationalized for all businesses.

The economic development strategy for South Dade is oriented to growing emerging industries which are resilient and friendly to environmental considerations. Even industries such as Aviation MRO which might appear on the surface to be carbon unfriendly, is an industry which is very much oriented today to integrating new technology into planes so that they are more fuel efficient and have the suite of avionics which will allow them to participate in significantly advanced routing which in turn reduces carbon emissions.

Finally, a core goal of the strategy is to support small business creation and enhance the 24-month survival milestone which research indicates is an important threshold for small businesses to be self-sustaining. This includes businesses that build or leverage emerging technology and are not as geographically constrained as in the past. If there is any silver lining from the current pandemic it has been the increasing willingness of companies of all sizes to allow employees to work from wherever they are rather than in traditional office space or campuses. Many of the largest tech companies have given workers at least until the end of 2021 to work from wherever they are. South Dade, which provides a range of housing choice, a high quality of life, proximity to urban amenities and one of the nation's most important airports could be expected to benefit from any fundamental shift in the nature/location of work which may occur as the global economy emerges from the COVID-19 emergency.

SECTION 6

SPECIFIC TARGET INDUSTRY STRATEGIES

To better focus the efforts for six emerging industries and three traditional industries this plan has identified as being the strongest candidate industries for future growth in South Dade or which need to be maintained given their existing importance to the South Dade economy, we have developed a summary of foundations for each industry which can be built upon, a set of specific strategies, and a matrix of the organization which is best suited to undertake the strategy. The core emerging and traditional industries include the following detailed below. It is important to note that a number of the South Dade industries align with the Beacon Council's One Community One Goal target industries which has not always been the case.

EMERGING INDUSTRIES

Health
Professional Services
Tourism
Insurance
Logistics
Aviation

TRADITIONAL INDUSTRIES

Agriculture
Defense
Retail

HEALTH INDUSTRY

BACKGROUND

With the strongest hospital system in South Florida, Baptist Health, and a stand-alone Jackson Memorial Hospital, South Dade is particularly well positioned to continue to realize growth in the health care sector. Yet, the health care industry is especially dependent upon national and state policies and competitive positioning. It is crucial that major health care providers have outside regional advocates which can support the goals and objectives of the industry. For example, the biomedical corridor in South Dade was established to leverage off of the Baptist Health system but with the exception of Noven Pharmaceuticals, has never had the marketing, grounding or focus to build off of the base which already exists. Given growth in biomedical in Miami-Dade County overall there is a strong opportunity to leverage the existing biomedical corridor for future growth.

SIGNIFICANT EXISTING SOUTH DADE HEALTH ASSETS

- Baptist Health South Florida -With more than 1.5 million patient visits every year, patients and their families from around the world travel to Miami for our medical expertise. Approximately 23,000 employees and more than 4,000 physicians in virtually all specialties, many with national and international reputations. All of this and more makes us South Florida's world-class healthcare organization. Components located in South Dade include:
 - Baptist Hospital
 - Homestead Hospital
 - West Kendall Baptist Hospital
 - Miami Cancer Institute
 - Miami Cardiac and Vascular Institute
- Jackson South Medical Center - Jackson Health System is a nonprofit academic medical system offering world-class care to any person who walks through its doors. Governed by the Public Health Trust, a team of citizen volunteers acting on behalf of the Miami-Dade Board of County Commissioners, Jackson Health System ensures that all residents of Miami-Dade County receive a single high standard of care regardless of their ability to pay.
- Community Health, Inc. South Florida -A nonprofit health care organization providing affordable quality primary and behavioral health care services to the residents of rapidly growing South Florida. CHI operates 11 state-of-the-art primary care centers and 35 school-based programs. All centers offer quality comprehensive primary and behavioral health care services. Our physicians are board certified or board eligible. Additionally, CHI is accredited by the Joint Commission and is accredited as a Level 3 Patient-Centered Medical Home by the National Committee for Quality Assurance (NCQA). CHI offers a "one-stop-shop" model where the organization and delivery of quality services are seamless, affordable, accessible and culturally sensitive.

- Noven Pharmaceuticals - Noven Pharmaceuticals, Inc. is a specialty pharmaceutical company engaged in the research, development, manufacture, marketing, and sale of prescription pharmaceutical products. Noven maintains state-of-the art, FDA-approved transdermal manufacturing facilities in Miami with capacity to produce several hundred million patches per year. These facilities are also approved by the US DEA (Drug Enforcement Agency) for the production of controlled substances.
- Preferred Care Partners, Inc.
- American Care, Inc. - American Care is a healthcare provider that provides direct healthcare services to its patients. American Care is also licensed in Florida as a discount medical plan organization to provide discounted medical services to its Premier Plans members. You can receive these discounted services as often as you need from American Care's healthcare providers.

CORE HEALTH INDUSTRY STRATEGIES

Core strategies to strengthen the health and pharmaceutical industries in South Dade include the following:

Continue to support current South Dade hospital expansion plans with State and federal regulators

Develop collateral material which can be used by hospital administrators and identifies core areas/buildings in South Dade to market to higher wage medical professionals so that they can easily identify high quality housing and medical office options

Work and advocate with county transit and municipality feeder transportation systems to ensure that bi-directional headways and feeder system headways are aligned with South Dade hospital shifts

Provide support and coordinate with Baptist Hospital in its continued expansion as a center for 'medical tourism' for affluent patients in the Americas and Caribbean.

Commence marketing of biomedical corridor through the Beacon Council and Enterprise Florida through the provision of maps and marketing materials specific to the industry.

Figure 33. Health Industry Strategy Implementation and Responsibility Matrix

Responsibility	South Dade Economic Development Organization/Business Community	County & Municipal Government	Beacon Council	Enterprise Florida & State	EDA & Regional Partners
Continue to support current hospital expansion plans with State and federal regulators	√		√		
Develop collateral material which can be used by hospital administrators and identifies core areas/buildings in South Dade to market to higher wage medical professionals so that they can easily identify high quality housing and medical office options	√		√		
Work and advocate with county transit to ensure that bi-directional headways and feeder system headways are aligned with South Dade hospital shifts	√	√	√		
Provide support and coordinate with Baptist Hospital in its continued expansion as a center for 'medical tourism' for affluent patients in the Americas and Caribbean.	√		√		√
Commence marketing of biomedical corridor through the Beacon Council and Enterprise Florida through the provision of maps and marketing materials specific to the industry.	√		√		

PROFESSIONAL SERVICES INDUSTRIES

BACKGROUND

One of the core advantages and adoption of continued advances in and reduced cost of technology is that it has made professional services industry nodes somewhat less important. Lawyers, accountants, engineers, architects no longer need to be collocated with others in their industry to be successful. Likewise, increased congestion leading to the traditional office nodes in the county has increased travel time to/from work which has impacted economic efficiency and reduced quality of life. Reasonable access to MIA, transit to courthouses and downtown, available office space, technology, and an increasingly large local employee base has made South Dade a viable option for professional service companies that even ten years ago felt the need to be located in Downtown Miami, Coral Gables, or around the Airport. Coupled with the increasingly challenging congestion facing executive decision makers who live in Pinecrest, Palmetto Bay, and Kendall who have their businesses in the core of Miami and Coral Gables or Doral; South Dade is an increasingly good option to headquarters a business which does not require a specific "address".

SIGNIFICANT EXISTING SOUTH DADE PROFESSIONAL SERVICES ASSETS

Cole, Scott & Kissane, P.A. - Multi-purpose law firm located throughout the State of Florida. The main office is located in South Dade.

Professional Management, Inc. 9,000 nits.

Metric Engineering, Inc. - Metric Engineering, Inc. was founded in 1976. Today, it is among the top consulting engineering firms specializing in civil and transportation projects.

Matrix Construction Group, Inc. - Matrix offers a full line of construction services and has successfully completed a variety of institutional, industrial, commercial, and design/build projects. Matrix Construction is specialized in commercial, industrial and educational new builds and renovations.

CORE PROFESSIONAL SERVICES INDUSTRY STRATEGIES

Core strategies to strengthen the professional services industries in South Dade include the following:

Direct mail/email campaign to all attorneys, registered architects, professional engineers, etc. which have their home address south of Kendall Drive, providing information on the professional office space options in South Dade (existing and proposed), existing and projected transit travel times once the BRT is complete from South Dade to Coral Gables, Downtown, and Airport, and the presence of support services required by each profession in the region (i.e. large format printing for architects and engineers or court reporting services for attorneys, etc.);

Maintain updated information through CoStar on the available office buildings, rents, and available space in South Dade; Work with County and municipalities to identify funding to extend water/sewer infrastructure to key commercial sites as detailed in Section 4 of the Plan;

Work with Miami-Dade College, FIU, MDCPS, and UM to identify those programs which could be strengthened on South Dade campuses to meet the needs of the professional services industries;

Work with real estate industry to establish a shared workspace facility in South Dade targeted to small business start-ups and larger companies which desire to be in proximity to small businesses which include but will not be limited to Professional Service providers;

Coordinate with Chamber South and South Dade Chamber to survey firms in the Professional Services to understand their challenges and growth potential; and,

Whenever possible, highlight professional service availability as an asset for attracting new business to South Dade.

The table below (Figure 34) outlines strategies each partner organization will be responsible for undertaking individually or in concert/partnership with other organizations.

Figure 34. Professional Services Strategy Implementation and Responsibility Matrix

Responsibility	South Dade Economic Development Organization/Business Community	County & Municipal Government	Beacon Council	Enterprise Florida & State	EDA & Regional Partners
Direct mail/email campaign to all attorneys, registered architects, professional engineers, etc. which have their home address south of Kendall Drive, providing information on the professional office space options in South Dade (existing and proposed), existing and projected transit travel times once the BRT is complete from South Dade to Coral Gables, Downtown, and Airport, and the presence of support services required by each profession in the region (i.e. large format printing for architects and engineers or court reporting services for attorneys, etc.);	√	√	√		
Maintain updated information through CoStar on the available office buildings, rents, and available space in South Dade.	√		√		
Work with County and municipalities to identify funding to extend water/sewer infrastructure to key commercial sites as detailed in Section 4 of the Plan.	√	√			
Work with Miami-Dade College, FIU, MDCPS, and UM to identify those programs which could be strengthened on South Dade campuses to meet the needs of the professional services industries.	√				√
Work with real estate industry to establish a shared workspace facility in South Dade targeted to small business start-ups and larger companies which desire to be in proximity to small businesses which including Professional Service providers.	√				√
Work with local chambers to survey firms in the Professional Services to understand their challenges and growth potential.	√				
Highlight professional service availability as an asset for attracting new business to South Dade.	√		√		

TOURISM INDUSTRY BACKGROUND

Tourism in South Dade is an industry that actually falls into both categories of being a traditional industry and an emerging industry. Traditionally, South Dade has enjoyed and benefited from the existence of two national parks that, within the National Park Service structure hold very esteemed positions due to their unique ecosystems.

Biscayne National Park, which officially became a National Park in 1980, is 270 square miles in size, 95% of which is water. The Park, the only national park that celebrates underwater ecosystems and Florida history as well as upland islands that are historically linked to the Florida Keys, has influenced the manner in which Miami-Dade County has treated land use along the shore. A good deal of the land use along the shore is designated for park and recreation use and conservation. This has protected the water quality of Biscayne Bay and ultimately, the National Park.

Everglades National Park, established by Congress in 1934, encompasses 1.5 million acres of one of the world's most diverse ecosystems. It is this diversity that has led to subsequent designations as an International Biosphere Reserve, Wetland of International Importance and a World Heritage Site. Because of its size and location adjacent to South Dade's agricultural area, a critical balance is needed to ensure that the park continues to receive the water it needs to survive without flooding the western-most agricultural areas.

These two treasures bookend an area that has recognized the value of nature-based tourism and the activities that traditionally go with this subset of tourism including cycling, kayaking, hiking, birding and other activities that celebrate the natural environment. Miami-Dade County also recognized the value of the natural environment and created park and recreation programs that are anchored by Zoo Miami, Deering Estate, Redland Fruit and Spice Park and other natural areas.

Miami-Dade County is in the process of approving a lease and development agreement for the construction of Miami Wilds at Zoo Miami. Miami Wilds, is an eco-sensitive project at the front door of Zoo Miami, composed of a best-in-class water park, family-friendly lodge hotel, and a number of small unique retail shops and restaurants. Miami Wilds will be linked to Zoo Miami and the heritage Gold Coast Railroad and Miami Defense Museums by a walkable learning connector. Sensitive to nearby natural areas, the 25.5 acre Miami Wilds project, located on public land adjacent to Zoo Miami, is outside of environmentally protected areas. Construction is expected to take 24 months after it begins in 2021 with a projected 2023 opening date.

This project has been pursued by the County for over 20 years as a means to keep Zoo Miami up to date as a tourism destination and to bring much needed economic activity to South Dade. This project is slated to create 304 jobs at opening and over 400 jobs over the life of the project. The development agreement commits the developer to engage local small business, use sustainable construction and operation methods and partner with the surrounding facilities to promote the wide variety of nature based touristic opportunities available around Zoo Miami and the South.

The Greater Miami Convention and Visitors Bureau (GMCVB) is a primary partner for Tourism in South Dade. In 2016, the GMCVB underwrote the effort to create the South Dade More to Explore campaign for the purpose of promoting economic activity in the area, GMCVB has used the tag line to create a webpage dedicated to South Dade and promotional materials that have been distributed in markets around the world during Sales Mission meetings intended to promote Miami-Dade County for tourism.

The GMCVB has also created a new campaign for Miami-Dade County that promotes "...Miami's Great Parks and Outdoors" throughout the County. The MIAMILAND campaign promotes the natural areas that are prevalent in South Dade as well as the proximity of these assets to the rest of Greater Miami area.

These campaigns have shown results relative to the development of new hotels in the South Dade area. According to the GMCVB's Research Division, by 2022, it is projected that there will be approximately 750 new hotel rooms with an additional 80 rooms to be developed at some point beyond 2022 in South Dade. The MIAMILAND campaign has also reached hundreds of travel professionals located in the northeastern United States, Canada, the United Kingdom and Western Europe.

SIGNIFICANT EXISTING SOUTH DADE TOURISM ASSETS

Everglades National Park - The Everglades spans across 1.5 million acres that stretches over the southern part of Florida, but it is easy to access the park's three main areas. The northern section of the park is accessible via Miami or Everglades City, the southern section is accessible through Homestead. Visiting the Everglades allows you to explore a vast diversity of flora and fauna in different ecosystems: freshwater sloughs, marl prairies, tropical hammocks, pinelands, cypress, mangrove, coastal lowlands, marine, and estuarine. There is a lot of area to discover at the Everglades, so it is vital to be prepared.

Biscayne National Park - The park preserves a rare combination of aquamarine waters, emerald islands and vibrant coral reefs all within sight of downtown Miami. The park takes advantage of its location next to this growing and diverse metropolis by partnering with a variety of local organizations to provide access for visitors to encounter and explore the scenery, wildlife, history and other amazing resources. To learn more please visit the following links:

Redland Fruit and Spice Park

Deering Estate -The Deering Estate preserves the 1920s era Miami estate of Charles Deering, Chicago industrialist, early preservationist, environmentalist, art collector, philanthropist and first chairman of the International Harvester Company. Nestled along the coast in South Dade, the Deering Estate is a cultural asset and historic site listed on the National Register of Historic Places. As a 21st Century museum destination for tourists and local residents, a variety of signature events, programs, tours and classes are offered throughout the year.

Fairchild Tropical Gardens

Zoo Miami -One of the world's great zoos, Zoo Miami houses more than 2,000 wild animals in an environment that closely approximates the animals' natural habitats and gives the visitor the feeling of embarking on an international safari or delving into the Amazon rainforests. Zoo Miami has more than 1,200 trees, plants and flowers visible from its walkways, adding to its beautiful, relaxing ambiance. Large, open-air exhibits allow visitors to enjoy beautiful and endangered wildlife at a safe yet remarkably close range. With 340 developed acres on a 740-acre parcel of land, Zoo Miami is the only zoo in the continental United States located in a subtropical climate.

Pinecrest Gardens - Pinecrest Gardens, South Florida's Cultural Arts Park, features over 1,000 varieties of rare and exotic tropical plants and palm trees in a native tropical hardwood and cypress setting. Our dramatic landscape enhanced with natural streams, caves and fissures provide most dramatic stage for our historically designated structures and buildings.

Coral Castle -Coral Castle's main feature is a sculpture garden in stone, built by one man, Edward Leedskalnin. From 1923 to 1951, Ed single-handedly and secretly carved over 1,100 tons of coral rock, and his unknown process has created one of the world's most mysterious accomplishments.

Monkey Jungle - Monkey Jungle is a one of a kind wildlife park and discovery center established in 1935 in a natural subtropical forest in southern Miami-Dade County. The Jungle wildlife live here much as they would in their native habitats.

MDM Hotel Group, LTD - The group entered the hospitality market with the acquisition of the Miami Marriott Dadeland in 1990. Subsequently the group developed the Courtyard by Marriott Dadeland in 2004 as part of this innovative complex. These transactions stimulated a transformation of the neighborhood they were located in to a vibrant business, retail and hospitality center. Similarly, the group's development of the JW Marriott Hotel Miami and Barclay's Financial Center in 1998 was the stimulus for a record setting decade of development in the Miami downtown Brickell Corridor.

Schnebly Redland Winery -Schnebly's, the Southernmost Winery in the United States. The winery produces a variety of exotic tropical fruit wines. The location has a restaurant and is a destination wedding venue.

Robert is Here - Robert Is Here is a family-owned and operated fruit stand in Homestead, Florida that specializes in Rare & Exotic fruits and vegetables, mostly grown in the Redland. Although the location started off as a literal Fruit Stand located on the side of the road, it has grown into a complete tourist destination equipped with an Animal Farm, Play Area and picnic tables.

CORE TOURISM INDUSTRY STRATEGIES

Continue to coordinate with the Greater Miami Convention and Visitors Bureau (GMCVB) to implement the "MiamiLand" & "More to Explore" marketing campaigns.

Whenever possible, participate with GMCVB in sales trips that promote South Dade.

Periodically, the GMCVB develops co-operative marketing programs in partnership with Expedia and other national travel programs. Local hotels and tourism venues should be encouraged to participate in these programs.

Advocate for zoning and other land use changes which allow lower density hospitality and low impact touristic activities outside of the UDB.

Below (Figure 35) is an implementation that provides guidance regarding which organizations have a role in fulfilling the recommended Implementation Strategy.

Figure 35. Tourism Strategy Implementation and Responsibility Matrix

Responsibility	South Dade Economic Development Organization/Business Community	County & Municipal Government	Beacon Council	Enterprise Florida & State	EDA & Regional Partners
Continue to coordinate with the Greater Miami Convention and Visitors Bureau (GMCVB) to implement the "MiamiLand" & "More to Explore" marketing campaigns.	√				√
Whenever possible, participate with GMCVB in sales trips that promote South Dade.	√				√
Periodically, the GMCVB develops co-operative marketing programs in partnership with Expedia and other national travel programs. Local hotels and tourism venues should participate in these programs.	√				√
Advocate for zoning and other land use changes which allow lower density hospitality and low impact touristic activities outside of the UDB.	√	√			√

INSURANCE INDUSTRY BACKGROUND

Insurance is a rapidly growing industry in South Florida and South Dade has always had an important base of insurance companies due to the fact that American Banker's insurance, one of the largest renter insurance providers in the nation, was founded and headquartered in the region. Adding to American Banker's (now part of the international Assurant group) is AvMed corporation, a Florida based major health insurer located in the Dadeland area and Baptist Hospital a major health care provider that principally relies on insurance for revenue. Insurance continues to be a specialized industry that requires certain skill sets (i.e. actuaries, insurance assessors, investigators) which for training and other purposes continue to be important to be collocated in a common region.

SIGNIFICANT EXISTING SOUTH DADE INSURANCE ASSETS

AvMed - AvMed is one of Florida's oldest and largest not-for-profit health plans, providing Medicare Advantage coverage in Broward and Miami-Dade counties, Individual and Family coverage in Miami-Dade, Broward, and Palm Beach, and coverage for Employer Groups in more than 30 counties across the state.

Assurant (American Bankers) - Assurant is a holding company for various underwriting entities that provide Renters Insurance and Resident Liability Insurance.

Baptist Health South Florida - With more than 1.5 million patient visits every year, patients and their families from around the world travel to Miami for our medical expertise. Approximately 23,000 employees and more than 4,000 physicians in virtually all specialties — many with national and international reputations. All of this and more makes us South Florida's world-class healthcare organization.

CORE INSURANCE INDUSTRY STRATEGIES

Engage insurance industry executives in major South Dade companies to participate in Economic Development efforts and to promote the industry in South Dade which has not occurred to date.

Offer support in efforts in Tallahassee to strengthen Insurance industry's position in Florida and development of incentives for new companies which are seeking to relocate to the State.

Develop unique marketing package for insurance providers including information on available land for campus development and large block of office space in South Dade which might accommodate their needs.

Work with Miami-Dade College, FIU, MDCPS, and UM to identify programs which could be strengthened to meet the needs of the insurance Industry.

The table below (Figure 36) outlines strategies each partner organization will be responsible for undertaking individually or in concert/partnership with other organizations.

Figure 36. Insurance Strategy Implementation and Responsibility Matrix

Responsibility	South Dade Economic Development Organization/Business Community	County & Municipal Government	Beacon Council	Enterprise Florida & State	EDA & Regional Partners
Engage insurance industry executives in major South Dade companies to participate in Economic Development efforts and to promote the industry in South Dade which has not occurred to date.	√		√		
Offer support in efforts in Tallahassee to strengthen Insurance industry's position in Florida and development of incentives for new companies which are seeking to relocate to the State.	√	√		√	
Develop a unique marketing package for insurance providers including available land and large block of office space in South Dade which might accommodate their needs.	√				√
Work with Miami-Dade College, FIU, MDCPS, and UM to identify those programs which could be strengthened to meet the needs of the insurance industry.	√				√

LOGISTICS BACKGROUND

Miami-Dade County has long been a major logistics and trade center with particular focus on Latin America and the Caribbean. All indications are that the logistics industry will continue to experience growth. However, available dry and cold storage and logistics space has become incredibly scarce in the County as land values in the central and northern subregions of the County have made the development of logistics facilities almost prohibitive. South Dade lower cost of land is now affordable enough in comparison to other areas of the county to offset the additional cost of trucking incurred by major users and tenants.

The transfer of surplus property to the county from the U.S. Air Force has provided the opportunity to diversify the local economy through the sale of land for the establishment of logistics facilities developed by Federal Express and Amazon. Federal Express purchased approximately 50 acres for \$38M for the development of a FedEx Ground station which opened in 2018 with 170 employees. Recently, Amazon purchased 76 acres in the same area for the development of distribution center and warehouse for \$22.0M. It is projected that this facility will house 325 permanent jobs.

SIGNIFICANT EXISTING SOUTH DADE LOGISTICS ASSETS

Miami Executive Airport - According to the Miami-Dade Aviation Department (MDAD), Miami Executive Airport (TMB) is one of the busiest general aviation airports in Florida, serving corporate, recreational, flight training, and governmental agency activities. Miami Executive Airport is just 15 minutes from the business centers of South Miami-Dade County. As a reliever to Miami International Airport, its location also provides fast and easy access to the Florida Turnpike, Ocean Reef, the Florida Keys as well as the recreational and business activities in Miami and Miami Beach. The airport provides modern, efficient, and professionally staffed fixed-base operator (FBO) facilities serving the expanding corporate and business interests of South Florida.

FedEx Ground South Dade- Opened in 2018, this center located on land that was previously a part of Homestead Air reserve Base serves as a logistics hub for FedEx Ground operations in the South Dade area.

Amazon Distribution Center - The warehouse could be Amazon's largest distribution center in South Florida, according to the Herald. Amazon plans to invest \$80 million at the property. About 25 percent of the funds used to purchase the site will go to the Miami-Dade Affordable Housing Trust Fund, and the remainder will go toward the Homestead Air Reserve Base Fund.

Foreign Trade Zone No. 166 -Foreign Trade Zone 166 Vision FTZ 166 is a General Purpose zone located in east Homestead. It is the southernmost free trade zone in the continental United States and provides a unique opportunity for Latin American operations.

CORE LOGISTICS INDUSTRY STRATEGIES

Work with county and municipalities to identify funding to extend water/sewer infrastructure to key commercial/industrial sites not yet served.

Prepare a package which shows available land and pricing of land in South Dade vs. other parts of the Miami-Dade region. Despite distance from major population centers, South Dade is increasingly a viable option for logistics companies given land and space pricing elsewhere in the county.

Build strategy to work with federal, state and local government to transition HARB to a joint use facility which over long term may support air cargo operations.

Work and advocate with county transit to ensure that bi-directional headways and feeder system headways are aligned with South Dade logistic company shifts.

Work with Miami-Dade county to extend Foreign Trade Zone (FTZ) 281 to cover all of Miami-Dade County as a way to apply FTZ benefits across the entire county.

Similar to the model in Albuquerque, NM, work with government to designate key development zones in South Dade principally in Homestead area which are designated for warehouse/logistics development and would have priority for infrastructure improvement.

The table below (Figure 37) outlines strategies each partner organization will be responsible for undertaking individually or in concert/ partnership with other organizations.

Figure 37. Logistics Strategy Implementation and Responsibility Matrix

Responsibility	South Dade Economic Development Organization/Business Community	County & Municipal Government	Beacon Council	Enterprise Florida & State	EDA & Regional Partners
Work with County and municipalities to identify funding to extend water/sewer infrastructure to key commercial/industrial sites not yet served.	√	√			
Prepare package which shows available land and pricing of land in South Dade vs. other parts of Miami-Dade region. Despite distance from major population centers, South Dade is increasingly a viable option for logistics companies given land and space pricing elsewhere in the County.	√		√	√	
Build strategy to work with federal, State and local government to transition HARB to a joint use facility which over long term may support air cargo operations.	√	√			√
Work and advocate with county transit to ensure that bi-directional headways and feeder system headways are aligned with South Dade logistic company shifts.	√				
Work with Miami-Dade county to extend Foreign Trade Zone (FTZ) 281 to cover all of Miami-Dade County as a way to apply FTZ benefits to the entire county.	√				√
Similar to the model in Albuquerque, NM work with government to designate key development zones in South Dade principally in Homestead area which are designated for warehouse/logistics development and would have priority for infrastructure improvement.	√	√	√		

AVIATION INDUSTRY BACKGROUND

Aviation has had a long history of providing economic benefit to Miami-Dade County and South Dade.

Growth in jobs in the Transportation and Warehousing industry sector, which includes Aviation, is projected to grow to 84,089 jobs by 2027 in Miami-Dade County. This represents a growth of 7,289 jobs or 9.5% over 2019 employment numbers.

The strength of this sector is due, in part to the various, significant assets that define the Aviation industry in South Dade. These assets include:

Miami Executive Airport - According to the Miami-Dade Aviation Department (MDAD), Miami Executive Airport (TMB) is one of the busiest general aviation airports in Florida, serving corporate, recreational, flight training, and governmental agency activities. Miami Executive Airport is just 15 minutes from the business centers of South Miami-Dade County. As a reliever to Miami International Airport, its location also provides fast and easy access to the Florida Turnpike, Ocean Reef, the Florida Keys as well as the recreational and business activities in Miami and Miami Beach. The airport provides modern, efficient, and professionally staffed fixed-base operation (FBO) facilities serving the expanding corporate and business interests of South Florida.

Miami Homestead General Aviation Airport - Situated approximately three miles northwest of the City of Homestead, Miami Homestead General Aviation Airport (X51) offers quick and easy access with no landing fees. The airport is adjacent to Everglades National Park and is only 25 minutes from Biscayne National Park's coral reefs. Miami Homestead General Aviation Airport is the closest airport to the Homestead/Miami Speedway in the agricultural community -- minutes west of the business areas of South Dade and the City of Homestead. Additionally, the airport provides a convenient link to all of the Florida Keys and is a short 30-minute drive from Key Largo and the Ocean Reef Club, famous for their world-class sport fishing and incredible coral reefs. Providing self-service Jet-A and 100LL fuel, Miami Homestead General Aviation Airport is the last refueling stop before the Florida Keys and points south. With its two paved and lighted runways, one Ultralight turf runway, Aerobatic box and Skydive drop zone; the airport serves all aspects of the general aviation community from business aircraft to skydiving and gliding.

Eig-Watson School of Aviation (Miami-Dade College) - Miami-Dade College Homestead Campus is the home of the Eig-Watson School of Aviation. This program offers associate degrees and certificate programs in a variety of disciplines including Aviation Administration, Air Cargo management, Transportation and Logistics and Global Logistics. The MDC School of Aviation has a partnership agreement with the local flight school Wayman Aviation and Pan Am International Flight Academy. In accordance with FAA regulations, the school operates under Part 141 certification and approval.

In addition to the economic activity that is generated through the airports, the growth in jobs in this sector is expected to occur through the maintenance, repair and operations sector of the industry. According to the Beacon Council, Miami-Dade has attracted leading aviation MRO (maintenance, repair, operations) providers from around the world due to the city's access to international markets, creating one of the largest MRO cluster of companies in the U.S. It should be noted that several of the major companies engaged in MRO are located in South Dade.

CORE AVIATION INDUSTRY STRATEGIES

Work with MDAD and Beacon Council's Aviation Committee to further market Miami Executive Airport to support MRO operations.

Coordinate with South Florida Defense Alliance team to engage USAF associated with commercial MRO opportunities for local companies at HARB.

In conjunction with the County, State, and Beacon Council, support and advocate for a modification to the record of decision which allows an evolution of HARB into a joint use base which can support MRO and private air cargo activities.

Work with local schools, technical programs, and universities to fully understand the aviation related programs and enrollment in the programs in order to be able to provide background information to potential aviation related companies interested in locating operations in South Dade.

Engage with MDAD, MDC, FIU and Beacon Council over long term to determine the viability of establishing a similar center to the Georgia Center of Innovation for Aerospace in and around either Miami Executive Airport or HARB.

The table below (Figure 38) outlines strategies each partner organization will be responsible for undertaking individually or in concert/ partnership with other organizations.

Figure 38. Aviation Strategy Implementation and Responsibility Matrix

Responsibility	South Dade Economic Development Organization/Business Community	County & Municipal Government	Beacon Council	Enterprise Florida & State	EDA & Regional Partners
Work with MDAD and Beacon Council's Aviation Committee to further market Miami Executive Airport to support MRO operations	√		√		
Coordinate with South Florida Defense Alliance team to engage USAF associated with private MRO opportunities for local companies at HARB	√				√
In conjunction with the County, State, and Beacon Council Support and advocate for a modification to the record of decision which allows an evolution of HARB into a joint use base which can support MRO and private air cargo activities	√	√	√	√	
Work with local schools, technical programs, and universities to fully understand the aviation related programs and enrollment in the programs in order to be able to provide background information to potential aviation related companies interested in locating operations in South Dade.	√				√
Engage with MDAD, MDC, FIU and Beacon Council over long term to determine the viability of establishing a similar center to the Georgia Center of Innovation for Aerospace in and around either Miami Executive Airport or HARB	√				√

AGRICULTURE INDUSTRY BACKGROUND

Miami-Dade County leads the state in the production of tropical vegetables, tropical fruits and ornamental nurseries, and ranks second in the production of winter vegetables and ornamental fish with a total economic impact of \$2.7 billion. Approximately 20,000 persons are directly or indirectly employed by Miami-Dade County's agricultural industry with most of this economic and employment activity occurring in South Dade.

Agriculture in South Dade faces challenges related to offshore competition and the demand for develop-able land. According to the 2019-2025 Strategic Plan issued by UF/IFAS Tropical Research and Education Center, other challenges include:

- Increased introduction of crops grown and disease pests.
- Increase environmental regulations and associated costs.
- Increase labor and other input costs.

The recommendations contained in this plan reflect the input of the UF/IFAS TREC as well as local farmers. Consistent with TREC's Strategic Plan, agriculture can survive its challenges provided new methods and innovations are devised to counter the threats.

Furthermore, local policies regarding agriculture need to look beyond land use policies and, collectively, local economic development policies need to focus on how to make the agricultural industry and its product more marketable, how to improve the supply chain, how to make the industry more sustainable through additional research, development of new plant materials and the introduction of more innovative ways to manage the agricultural process.

Agriculture in South Dade is also major contributor to the nature-based tourism movement that entices our neighbors from other parts of Miami-Dade County and tourists from outside of the County to visit South Dade to sample tropical fruits, purchase orchids and ornamental plants, and enjoy a more relaxed environment. This tourism movement is supported by the Greater Miami Convention and Visitors Bureau especially through their MiamiLand campaign. Without a viable and diverse agricultural industry, this tourism opportunity may not exist.

SIGNIFICANT EXISTING AGRICULTURE ASSETS

Agriculture in South Dade benefits from strong partners who have been engaged in the industry for decades as well as new partners that are bringing innovation to South Dade; they include:

Atlantic Sapphire Salmon Farm - Atlantic Sapphire is pioneering Bluehouse® salmon farming, locally, and transforming protein production, globally. Atlantic is currently building the world's largest Bluehouse in Homestead, Florida, a location that has been identified as ideal for large-scale Bluehouse salmon farming. The first phase of our project is nearing completion, and they will be delivering Florida-grown Atlantic salmon to US consumers starting in 2020.

Brooks Tropicals Holding, Inc. - This grower of tropical fruits and vegetables has been operating since the early 1900s. Today, they grow avocados, starfruit, passionfruit, dragonfruit, lychees, mamey, jackfruit, papayas in South Dade and in Central America.

Costa Farms - Costa Farms is one of the largest horticultural growers in the world. The company started in 1961 when founder, Jose Costa Sr., purchased 30 acres south of Miami to grow tomatoes in the winter and calamondin citrus in the summer. That soon morphed into houseplants, and the Costa Farms started innovating and introducing ornamental plants. Today they grow more than 1,500 varieties of houseplants.

R.F. Orchids - South Florida's oldest and largest orchid nursery. R.F. Orchids is known internationally for the variety of orchids and their standing in the orchid industry.

Gulf Stream Tomato Packers - Gulfstream Tomato Packers is part of the Farm Support Services Industry. Gulfstream Tomato Packers has 300 total employees across all of its locations and generates \$11.8 million in sales.

Dade County Farm Bureau - Miami-Dade County's oldest and largest agricultural organization, Dade County Farm Bureau was the first county Farm Bureau established in Florida. For over 75 years, the DCFB has been an integral part of the agricultural community, bringing farmers together to solve issues collectively. Dade County Farm Bureau has over 900 grower members, making it the largest agricultural organization in Miami-Dade County.

UF Tropical Research and Education Center - The Tropical Research and Education Center (TREC) of the Institute of Food and Agricultural Sciences (IFAS), University of Florida (UF) is located in Homestead, Florida about 30 miles (48 km) south of Miami. The Center was established in 1929 by an act of the state legislature, on land donated by the Krome family. TREC has long been recognized locally, regionally, and internationally for basic and applied research in the areas of tropical fruit crop biotechnology, environmental stress and plant reproductive physiology, entomology, plant pathology, and horticulture in a warm subtropical environment.

CORE AGRICULTURE INDUSTRY STRATEGIES

Advocate for additional housing for graduate students working at the UF Tropical Research and Education Center. Research performed by graduate students allows new crops to be placed in the hands of farmers quicker.

Assist the farm community strengthen the supply chain for the production of new products resulting from new agricultural crops, i.e., the production of vanilla by supporting the development of plants and packing houses.

Work with the farm bureau to expand knowledge of innovation efforts in Agriculture through transfer of knowledge from other areas of the United States and world.

Encourage changes to rules which will allow the continued evolution of farms to provide the facilities to support agritourism in the region.

The table below (Figure 39) outlines strategies each partner organization will be responsible for undertaking individually or in concert/partnership with other organizations.

Figure 39. Agriculture Strategy Implementation and Responsibility Matrix

Responsibility	South Dade Economic Development Organization/Business Community	County & Municipal Government	Beacon Council	Enterprise Florida & State	EDA & Regional Partners
Advocate for additional housing for graduate students working at the UF Tropical Research and Education Center. Research performed by graduate students allows new crops to be placed in the hands of farmers quicker.	√	√		√	√
Assist the farm community strengthen the supply chain for the production of new products resulting from new agricultural crops, i.e., the production of vanilla by supporting the development of plants and packing houses	√		√	√	
Work with the farm bureau to expand knowledge of innovation efforts in Agriculture through transfer of knowledge from other areas of the United States and world.	√	√	√	√	√
Encourage changes to rules which will allow the continued evolution of farms to provide the facilities to support agritourism in the region.	√			√	

DEFENSE INDUSTRY BACKGROUND

The Defense Industry in South Dade has historically been one of the three legs of the 3-legged stool that defined the region's economic activity. Like agriculture and tourism, defense related economic activity defined the South Dade as a Defense-friendly community that rallied around the base and provided support to the individuals assigned to the base. This changed in 1992 with the impact of Hurricane Andrew and the subsequent 1993 decision by the Base Realignment and Closure Commission decision to downsize Homestead Airforce Base to an Air Reserve Base. This change in status eliminated the Defense housing, hospital, commissary, and recreational facilities that served the active duty and substantial Defense retiree community that called South Dade home. As a result of the hurricane damage and the change in base status, the retiree community population dropped substantially.

In 2004, the Department of Defense and Miami-Dade County came to agreement on the transfer of 766 acres of surplus federal property to the County for economic development and job creation purposes provided that commercial aviation would not be one of the activities. Furthermore, the base has rebounded reporting that the base continues to be a major contributor to the economic growth of South Florida, generating over \$331 million into the local economy in fiscal year 2018, which represents a 50 percent increase since 2008, according to the base finance office. Furthermore:

The economic activity at the base includes more than \$185 million in construction, services and material contracts that were awarded to mainly local businesses in 2019. The economic increase is approximately \$18 million more than in 2018. The base's total economic impact has doubled since 2003 with no signs of slowing down.

Currently, the base employs over 1,400 full-time employees who live in the Homestead and South Dade communities and another 1,700 Air Force reservists who drill monthly at the base. The 482nd Fighter Wing, an Air Force Reserve unit, is the installation host.

Homestead ARB's total payroll for FY 2018 is in excess of \$99 million.

The estimated number of indirect jobs created is 837.

The Defense presence also directly impacts the local economy through many subtle, yet important, contributions. Auto fleet maintenance, linen and laundry service, purchases from local beverage distributors, grounds maintenance, and contracted electrical, painting and plumbing work are other examples of the direct economic impact on the local community, totaling in the millions of dollars.

The base spent more than \$559,000 in FY 2018 on local hotels. Many reservists stay off base in Homestead and Florida City during monthly unit training assemblies.¹

Over the years, as a result of the advocacy provided by the Beacon Council Defense program and Miami-Dade County, the location of additional Defense units adjacent to HARB but within the County-owned property, including the Special Operations Command Headquarters and U.S. Coast Guard Miami Safety and Security Team have assisted in securing the long term viability of the base.

The location of Homestead Air Reserve Base in South Dade provides the opportunity for a partnership with Miami-Dade County for use of the airfield. Joint Use would allow the investment of Federal Aviation Administration funding, as well as County Aviation funds, in the maintenance of HARB's 11,000 linear foot runway and related taxiways, thus relieving the Base of bearing the full brunt of airfield maintenance. In return, Joint Use would also allow access to general aviation to use of the airfield for landing and takeoff.

Prior to September 11, 2001, joint use of the airfield was permitted for General Aviation uses and Miami-Dade County Aviation managed the fixed based operation on land adjacent to the runway which was controlled by the County. After 9/11, the Air Force eliminated the joint use due to post-9/11 heightened security issues. These restrictions were relaxed by the Air Force in the early 2000s.

In 2015 the Board of County Commissioners passed a resolution directing the County Mayor to negotiate with HARB for limited, civilian Joint Use at HARB. These negotiations are currently underway and the agreement will be signed upon identification of the location for the Fixed Base Operator. Upon execution of the agreement, it is currently estimated by the Aviation Department that the Fixed Base Operator could cost approximately \$50 million and take 2 years to complete. The establishment of a Joint Use at HARB for civilian use could open the door for more commercial aviation uses such as MRO and limited cargo operations which are now prohibited at the land adjacent to HARB.

South Dade is home to significant Defense assets that represent different branches of the United States Department of Defense and the Department of Homeland Security. Below is a brief description of these assets:

Homestead Air Reserve Base - The 482nd FW, the host unit of Homestead ARB, supports contingency and training operations of U.S. Southern Command and a number of tenant units, including Headquarters Special Operations Command South, the U.S. Coast Guard Maritime Safety and Security Team, and an air and maritime unit of U.S. Customs and Border Protection. In addition, Homestead ARB is home to the most active North American Aerospace Defense Command (NORAD) alert site in the continental United States, operated by a detachment of F-15 fighter interceptors from the 125th FW of the Florida Air National Guard. The 482nd FW continues to provide the Department of Defense with an efficient, cost-effective air reserve base on the rim of the Caribbean Basin. Its strategic presence at the southernmost tip of the continental United States provides an invaluable platform from which to launch its full range of capabilities. Poised to protect and defend, readiness is its primary mission.²

Special Operations Command South (SOCSOUTH) - SOCSOUTH supports the USSOUTHCOM Strategy of Cooperative Regional Peacetime Engagement by providing SOF capabilities that assist in shaping the theater's security environment, while ensuring appropriate forces are postured to respond when U.S. interests are threatened. Toward this end, SOCSOUTH manages over 200 SOF deployments annually, averaging 42 missions in 16 countries at any given time.³

U.S. Coast Guard Engineering Unit (in support of U.S. Coast Guard District 7) - Located on approximately 100 acres adjacent to Zoo Miami, the Engineering Unit manages the communications facility for USCG District 7 as well as providing administrative support to District 7 personnel in the areas of housing, transportation and other support services.

Luis Martinez Army Reserve Unit - This Army Reserve Unit is located on 10-acres of federal property adjacent to Zoo Miami. The facility houses 12 units of the US Army Reserve that provide training to reservists assigned to medical companies, transportation detachments, engineering companies and civil affairs battalions.

1. Source: <https://www.homestead.afrc.af.mil/About-Us/Fact-Sheets/Display/Article/700488/homestead-air-reserve-base-economic-impact/>

2. Source: <https://www.homestead.afrc.af.mil/Portals/134/Documents/History>

3. Source: <https://www.globalsecurity.org/Defense/agency/dod/socsouth.htm>

CORE DEFENSE INDUSTRY STRATEGIES

- Implement recommendations from The Beacon Council's Defense Reinvestment Grant (DRG) funded strategy, including treating defense related industries as a targeted industry in order to capture rising Defense expenditures, especially in the State of Florida. The areas of focus should include
- Cybersecurity
- Health IT
- Aircraft MRO and Parts
- Logistics IT
- Strengthen the relationship with the South Florida Defense Alliance
- The LEDO should strengthen and, if necessary, re-establish relationships with Defense installations located in Miami-Dade County and especially, South Dade.
- The LEDO should advise Miami-Dade County regarding this effort through the County's Defense Affairs Advisory Board.
- Advocate for beddown of F-35 squadron.
- Advocate for the location of the Spacecom Headquarters in South Dade.
- Monitor the progress of the request from Miami-Dade County to HARB to enter into a Joint Use to allow limited commercial use at HARB.

The table below (Figure 40) outlines strategies each partner organization will be responsible for undertaking individually or in concert/ partnership with other organizations.

Figure 40. Defense Strategy Implementation and Responsibility Matrix

Responsibility	South Dade Economic Development Organization/Business Community	County & Municipal Government	Beacon Council	Enterprise Florida & State	EDA & Regional Partners
Implement recommendations from The Beacon Council's DRG funded strategies, including treating defense related industries as a targeted industry in order to capture rising Defense expenditures, especially in the State of Florida. The areas of focus should include Cybersecurity, Health IT, Aircraft MRO and Parts, and Logistics IT.	√		√		
Strengthen the relationship with the South Florida Defense Alliance.	√				
The EDC should strengthen and, if necessary, re-establish relationships with Defense installations located in Miami-Dade County and especially, South Dade.	√				√
The EDC should advise Miami-Dade County regarding this effort through the County's Defense Affairs Advisory Board.	√	√			
Advocate for F-35 squadron beddown at Homestead Air Reserve Base.	√	√	√	√	√
Advocate for the location of the Spacecom Headquarters in South Dade.	√	√	√	√	
Monitor the progress of the request from Miami-Dade County to HARB to enter into a Joint Use to allow limited civilian use at HARB	√	√	√	√	

RETAIL INDUSTRY BACKGROUND

As a source of employment, approximately 10.9% of the workforce in South Dade is employed in some form of retail in the area. As a result, retail is a core industry that needs to be part of any economic development strategy for the region. In light of the evolution in retail that have been seen throughout the country and accelerated during the pandemic, special attention needs to be focused on retail to ensure that jobs are not lost and the real estate footprint that supports retail remains viable.

The recommendations that are contained in this section resulted from consultation between the Project Team and the businesses that are engaged in retail in South Dade, primarily the major malls and representatives of the real estate community. The practitioners involved in retail agreed that while Retail is changing, the market is still strong and is evolving into an industry that is much more interdependent with housing development, tourism and food service than it had been in the past. Our recommendations reflect the growing interdependency and the need to view retail spaces as a place for the community to come together for events as well as shopping.

SIGNIFICANT RETAIL ASSETS

South Dade is fortunate to have some of the more significant assets in Miami-Dade County in the project area. Below is a brief description of the assets:

Dadeland Mall - Dadeland Mall, Miami's original and most iconic shopping center is anchored by Florida's largest Macy's, as well as Macy's Home Gallery & Kids, and other major retailers. Shops and dining destinations span more than 1.4 million square feet and features more than 185 retail stores and restaurants.

The Falls Miami - The Falls is a shopping, dining and entertainment destination for families in South Florida. The 55-acre shopping center and tourist destination is home to more than 100 specialty stores, restaurants, and cafés as well as The Fresh Market.

Southland Mall - Southland Mall, formerly known as Cutler Ridge Mall, opened in 1978 as an extension of the Cutler Ridge Shopping Center, which opened in 1960. The mall was devastated by Hurricane Andrew in 1992, reopened the following year and was renamed Southland Mall in 2003. Southland Mall houses 71 retailers, including Ross Dress For Less, Sephora and Men's Wearhouse, along with 18 casual/fast-food restaurants such as Applebee's and Teriyaki Ninja. The mall is also home to Regal Southland Mall cinema.

Florida Keys Outlet Marketplace - Florida Keys Outlet Marketplace is an open-air center that serves the nearby communities of Key Largo, Homestead and Kendall. Located at the end of the Florida Turnpike on US 1, the Florida Keys Outlet Marketplace houses over 50 retailers ranging from women's apparel to shoes to children's apparel.

The Palms at Town and Country - Located in the West Kendall area of South Dade, The Palms at Town & Country provides an over 70 nationally recognized stores, eclectic shops, and dining options that showcase unique local and regional flair.

Interfoods of America, Inc. (fast food operator) - Interfoods of America is the largest US franchisee of Popeyes restaurants with about 140 locations in seven states (mostly Florida). The restaurants are operated through the company's wholly owned subsidiary Sailormen inc. Jointly, both companies have over 5,700 employees.

CORE RETAIL INDUSTRY STRATEGIES

- Partner with local mall owners and real estate professionals to assist with marketing of available retail spaces.
- Encourage more community use of existing malls
- Develop site selector tours (virtual and in-person) of retail properties available for re-development.
- Support land use, zoning and incentives to support repositioning of malls and retail centers which are transitioning as a result of major market shifts
- Work with local education and training programs to encourage more soft-skills training for retail personnel.

The table below (Figure 41) outlines strategies each partner organization will be responsible for undertaking individually or in concert/ partnership with other organizations.

Figure 41. Retail Strategy Implementation and Responsibility Matrix

Responsibility	South Dade Economic Development Organization/Business Community	County & Municipal Government	Beacon Council	Enterprise Florida & State	EDA & Regional Partners
Partner with local mall owners and real estate professionals to assist with marketing of available retail spaces.	√	√	√		
Encourage more community use of existing malls.	√	√	√		
Develop site selector tours (virtual and in-person) of retail properties available for re-development.	√	√	√		
Support land use, zoning and incentives to support repositioning of malls and retail centers which are transitioning as a result of major market shifts			√		
Work with local education and training programs to encourage more soft-skills training for retail personnel.	√				√

SECTION 7

ESTIMATED ECONOMIC & FISCAL IMPACTS OF IMPLEMENTING STRATEGY (REMI)

An economic and fiscal impact simulation predicts the economic and fiscal effects of one or more interventions occurring on the local economy caused by activities such as new business, project venture, government policy, environmental regulations and other changes. The following is an effort to estimate the possible economic and fiscal impact of the South Dade economic development on Miami-Dade County through 2027. Specifically, three employment growth scenarios under various economic development strategies were simulated in this report: Scenario A - no intervention, Scenario B - moderate intervention, and Scenario C - significant Intervention (Figure 42)

Figure 42: Employment Growth Scenarios Under Various Economic Development Strategies

2017-2019	SCENARIO A BASELINE HISTORIC TREND	SCENARIO B MODERATE INTERVENTION	SCENARIO C SIGNIFICANT INTERVENTION
NAICS 2-Digit Employment Codes	New Jobs	New Jobs	New Jobs
Agriculture, Forestry, Fishing and Hunting	3	3	4
Mining, Quarrying, and Oil and Gas Extraction	2	2	2
Construction	690	690	690
Manufacturing	(68)	(68)	(68)
Wholesale Trade	274	274	274
Retail Trade	1,252	1,252	1,252
Transportation and Warehousing	398	547	802
Information	(70)	(70)	(70)
Finance and Insurance	519	769	1,026
Real Estate and Rental and Leasing	119	119	119
Professional, Scientific, and Technical Services	1,595	2,391	3,188
Management of Companies and Enterprises	-	-	-
Administration & Support, Waste Management and Remediation	300	300	300
Educational Services	-	-	-
Health Care and Social Assistance	4,690	7,021	9,361
Arts, Entertainment, and Recreation	-	-	-
Accommodation and Food Services	1,481	2,222	2,963
Other Services (excluding Public Administration)	-	-	-
Public Administration	482	482	482

The following simulations were conducted using REMI Tax-PI to forecast the economic and fiscal impact of this project through 2027. REMI Tax-PI is a dynamic modeling software that incorporates different aspects of modeling approaches, which include input-output, general equilibrium, econometrics, and economic geography. The model is calibrated specifically to Miami-Dade County for policy analysis and forecasting and includes economic and demographic and policy variables so that any project or policy that affects the local economy can be tested. REMI is used by government agencies (including most U.S. state governments), consulting firms, nonprofit institutions, universities, and public utilities.

Depending on the intensity of competition and substitution/cannibalization effects of the new businesses between South Dade and the rest of Miami-Dade County, the impact of each scenario in 2027 ranges from minimum - assuming the products and services of those new businesses in South Dade are completely substitutable to the rest of the County to maximum - assuming the products and services of those new businesses in South Dade are unique to the rest of the County therefore no cannibalization of the sales from the rest of the County.

Note: In the estimates from REMI, there is no spatial distribution within the county of the net economic and fiscal impacts. The South Dade region considered in this analysis is roughly evenly divided between incorporated and unincorporated areas. However, there is no way to precisely locate the incremental benefits and costs or expenses from the implementation of the strategic plan. First, the direct investments and job creation are conceptual, not specific. Indirect and induced investments and employment could occur anywhere in South Dade or even elsewhere in the county. The same is true with respect to the fiscal benefits and expenses accruing from implementation. Both the South Dade municipalities and Miami-Dade County will realize additional tax and fee revenue as well as expenses from the demand for additional services. The numbers reported here are derived from financial ratios calculated from latest 3 years of historical Miami-Dade County financial statements. Tax and expenditure rates for the municipalities will be different with some categories higher and others lower. However, as noted above, due to the conceptual nature of the strategic plan at this point, no attempt at “guessing” the distribution of benefits and costs has been made.

ECONOMIC AND FISCAL IMPACT ANALYSIS RESULTS

The economic impact under these three scenarios can be measured by the changes from the baseline forecast in total employment, gross regional product, real disposable personal income, residential capital stock, and non-residential capital stock. Net fiscal impact to Miami-Dade County government budget are also measured under each scenario. The resulting values are expressed in millions of 2020 fixed dollars and summarized in Figure 43.

Figure 43: Economic and Fiscal Impact Summary in 2027

Category	SCENARIO A		SCENARIO B		SCENARIO C	
	Historic		Moderate		Significant	
	Trend		Intervention		Intervention	
	Min	Max	Min	Max	Min	Max
Total Employment (# of Jobs)	8,918	22,694	11,338	31,066	13,905	39,691
Gross Regional Product (GRP) (\$M)	\$856	\$2,084	\$1,086	\$2,841	\$1,330	\$3,620
Disposable Personal Income (\$M)	\$513	\$1,313	\$656	\$1,800	\$808	\$2,300
Residential Capital Stock (\$M)	\$368	\$940	\$471	\$1,291	\$580	\$1,649
Non-Residential Capital Stock (\$M)	\$259	\$401	\$315	\$562	\$373	\$728
Net Fiscal Impact (\$M)	\$28	\$50	\$35	\$73	\$42	\$96

EMPLOYMENT

For purposes of this analysis, employment includes both full-time and part-time jobs in Miami-Dade County. It includes the direct jobs created by the projects, the indirect jobs created by other businesses as a result of the needs of these projects, the induced jobs created by the expenditures of the direct and indirect employees, the investment activity jobs created to produce the needed capital goods for the projects, and state and local employment to support population growth and increased economic activity.

REMI estimates the net employment impact of scenario A on Miami-Dade County in 2027 would range from 8,918 to 22,694 jobs; scenario B would range from 11,338 to 31,066 jobs; and scenario C would range from 13,905 to 39,691 jobs.

GROSS REGIONAL PRODUCT (GRP)

Gross Regional Product (GRP) is analogous to the nation's Gross Domestic Product (GDP). It is the total value of all goods and services produced in a region. It can be used as a barometer to gauge a region's economic well-being. REMI estimates the net GRP impact of scenario A on Miami-Dade County in 2027 would range from \$856M to \$2,084M; scenario B would range from \$1,086M to \$2,841M; and scenario C would range from \$1,330M to \$3,620M.

DISPOSABLE PERSONAL INCOME

Disposable Personal Income (DPI) represents the after-tax income that can be spent or saved by income earners. According to REMI, the impact of total DPI in the county in 2027 for scenario A would range from \$513M to \$1,313M; scenario B would range from \$656M to \$1,800M; and scenario C would range from \$808M to \$2,300M.

CAPITAL STOCK

Residential capital stock is the value of all residential capital (housing structures) in the region accumulated over time, net of depreciation. According to REMI, the impact on residential capital stock in the county in 2027 for scenario A would range from \$368M to \$940M; scenario B would range from \$471M to \$1,291M; and scenario C would range from \$580M to \$1,649M.

Non-residential capital stock is the value of all non-residential capital (non-housing structures) in the region accumulated over time, net of depreciation. REMI estimates the non-residential capital stock impact of scenario A on Miami-Dade County in 2027 would range from \$259M to \$401M; scenario B would range from \$315M to \$562M; and scenario C would range from \$373M to \$728M.

FISCAL IMPACT

Fiscal impact is the net impact on Miami-Dade County government's fiscal balance sheet, i.e., total revenues minus total expenditures. REMI estimates the net fiscal impact of scenario A on Miami-Dade County in 2027 would range from \$28M to \$50M; scenario B would range from \$35M to \$73M; and scenario C would range from \$42M to \$96M.

SECTION 8 INITIAL MARKETING APPROACH

As part of the development of the economic development strategy, an initial marketing strategy was developed to provide a foundation for a fully formed marketing program. The preliminary strategy is built on information that has been collected in past economic development strategy efforts and provides a basis for the LEDO to commence marketing efforts. The goal of this strategy is to:

- Help attract, retain and expand businesses and identify the target audience;
- Improve the community's image and position within South Dade, on a countywide basis, as well as outside of the County; and,
- To identify and promote policies and programs that can improve the business environment in South Dade.

BACKGROUND

As part of the effort to compile this strategic plan, the project team met with the Beacon Council to discuss how Beacon can assist the South Dade EDC to market South Dade to attract jobs and businesses to the area. Also discussed was how South Dade could adapt the South Dade More to Explore marketing tag line and imagery, that has been very successful for tourism, for economic development marketing.

The Beacon Council staff described the current marketing strategy for Miami-Dade County which uses the Advantage Miami name. Advantage Miami focuses on the "Miami" brand in an effort to promote the County on the basis of the fact that whether you are in Homestead or Aventura, people from outside of the County know the area as "Miami".

The possibility of adapting the current South Dade More to Explore to South Dade More to Explore...for Economic Development was also explored. While there was concurrence among the meeting attendees to keep South Dade More to Explore...for Economic Development for the time being, a fully developed enhanced economic marketing tagline and program will be required to be developed in order to more fully market the area. Below (Figure 44) is one demonstration of imagery that could be used within marketing material for South Dade economic development.

Figure 44: Sample Images for South Dade Economic Development Marketing Material



While a need exists for South Dade to retain its identity it was agreed that The Beacon Council would promote South Dade under the umbrella of Advantage Miami as a means of bringing attention to the area from entities outside of the County.

RECOMMENDATION TO DEVELOP A DETAILED MARKETING STRATEGY

It is strongly recommended that an initial step in the implementation of this plan should be to develop a marketing strategy specific to the recommendations contain in this plan. The strategy would benefit from working with organizational partners and should include:

- Community Positioning and Image
- Who are the target audiences?
- How to target the industries contained in this report?
- Development of marketing tools
- Mechanisms for the delivery of the marketing strategy

Specific recommendations associated with marketing of each industry are included within the individual industry matrices in Section 6.

SECTION 9

IMPLICATIONS OF SEA LEVEL RISE/CLIMATE CHANGE ON ECONOMIC DEVELOPMENT

While climate change will impact all facets of living and doing business in South Dade including increased cost and risk of doing business; higher than normal temperatures and sea level rise will particularly impact two major industries in South Dade that are especially vulnerable to the impact of climate change: the Defense and Agriculture

Temperature is expected to rise by 1.8 to 4.0 degrees Celsius by the end of the century having major impacts on Miami-Dade County, its water levels and salt water intrusion which in turn will threaten low lying Homestead Air Reserve Base and the agricultural areas of South Dade.

Homestead Air Reserve Base's location adjacent to Biscayne Bay makes it vulnerable to frequent flooding as well as hurricane impact. Beyond water intrusion under existing trends, extreme heat days at Florida's Air Force and Navy bases would rise from 29 days per year to 102 days a year by mid-century, with the Union of Concerned Scientists forecasting the Homestead Air Reserve Base to be near the 100-day mark. This has broad implications not only for base operations but also is likely to impact humanitarian and other missions for the Defense stationed at Homestead which are responsible for responding to crises throughout the Caribbean Basin. While, the Department of Defense (DOD) is developing policies and plans to manage and respond to the effects of climate change on DOD missions, assets, and the operational environment, the environmental impacts can significantly hinder the mission of Defense installations, as was experienced in South Dade following Hurricane Andrew and more recently at Tyndall Air Force base from Hurricane Michael in 2018.

While the future of HARB's operations are clearly at risk from sea level rise, according to Renee Cho, author with the Earth Institute at Columbia University, the economic sector most vulnerable to climate risk is agriculture. Extreme rainfall and flooding are impacting agricultural production throughout the United States. In addition, increased heat and drought are likely to reduce crop yields. A reduction in yields causes a disruption to the marketplace domestically and abroad.

In South Dade, the University of Florida Tropical Research and Education Center is partnering with local government and the agricultural community to research and development innovations in agricultural practices and products that will mitigate the impact of climate change. A particular challenge to agriculture is the demand for potable water.

Given the importance of these industries to South Dade's future the LEDO should be a central participant in local and regional resiliency efforts such as Resilient 305, as well as efforts related to Homestead Air Reserve Base through the Department of Defense and US Army Corps of Engineers and agricultural efforts coordinated through the TREC Center. Through this participation, the LEDO can be aware of the threats to the region's economy and timing of those threats.

In turn, the LEDO can be an important advocate for resiliency efforts and investments at the local, county, state and federal levels.

APPENDIX A IEDC ROADMAP



South Miami Dade

Roadmap for Economic Development

August 10, 2018



INTERNATIONAL
ECONOMIC DEVELOPMENT
COUNCIL

The Power of Knowledge and Leadership

- Largest professional association of economic development professional globally (5,000+ members)
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- Volunteer members involved in helping impacted communities

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News & Resources



Community Colleges' Roles in Economic Diversification

This trio of papers was developed to explore the various ways that community colleges aid the economic diversification of their service areas. The papers were developed in partnership with the American Association of Community Colleges, with [\[more\]](#)



IEDC's Heartfelt Condolences to Those Impacted by Recent Hurricanes & Tropical Storms

IEDC's board of directors and staff send our heartfelt sympathies and prayers to those who are being impacted by the recent hurricanes and tropical storms, including Harvey, Irma, Maria, Jose and other catastrophic and unprecedented events... [\[more\]](#)



Webinars for economic development in small and rural Communities that have faced disinvestment

This series of six webinars addressed top challenges faced by small and rural communities who had coal impacted economies and explored opportunities for these communities to build

Welcome

RestoreYourEconomy.org provides resources and best practice information for public and private stakeholders who are seeking to rebuild their local economies after an economic disruption, be it a natural disaster or man-made crisis, as well as assisting the business community in preparing for a disruption.

It is a one-stop shop of disaster preparedness, post-disaster economic recovery, and economic resilience resources, tools, event announcements as well as opportunities to connect with peers through social media groups.

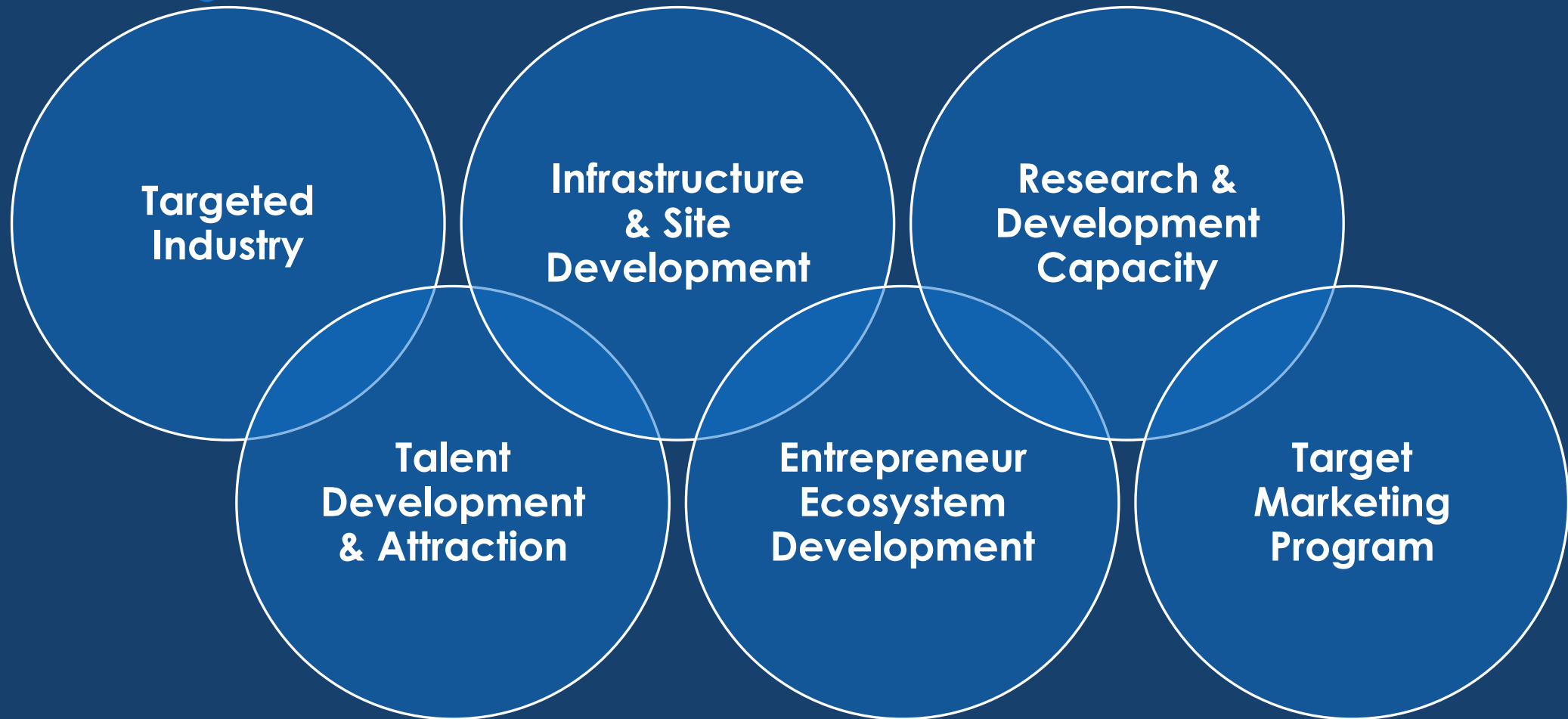
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Tadich & Enzo, a.k.a. TadZo

- Economic Development Consulting
 - Asset Evaluations/Inventories
 - Economic Development Strategic Planning
 - Workforce Development Strategies
 - Target Industry Analysis
 - Business Marketing
- Site Selection
- Community Engagement & Facilitation
- Experience with 100+ communities and regional groups across 27 U.S. states and Canadian provinces
- Certified Economic Developer & Fellow Member
- Professionally-trained Facilitator

EDA Proposal: Strategic Plan for Economic Development



Process

August 6, 2018:

Focus group session with EDC of South Miami Dade board members.

- Identified opportunities and challenges; shared information on best practices in economic development; and discussed examples of EDO structures and funding.

Windshield tour of South Miami Dade region.

- Met with executives at Atlantic Sapphire salmon farm and toured facilities under construction.

Focus group session with leaders in Tourism and Retail.

- Asked about challenges, opportunities, and identified trends.

Process

August 7, 2018

Interviews with business leaders and chambers of commerce.

- Discussed patterns and trends opportunities; and challenges they want solved.

Tour of South Dade Incubator

- Gather information on entrepreneurial assets, training, funding, and other resources. Entrepreneurship activity occurring in the region. What are the gaps in services/resources?

Met with Commissioner Dennis Moss

- County perspective and landscape for economic growth.

Process

August 7-9

Focus Group sessions for the following strategic priorities:

- **Talent Development and Attraction**
- **Infrastructure and Site Development Focus Group**
- **Targeted industry development strategies and cluster development strategies**
- **Research and development capacity building**
- **Entrepreneurial ecosystem development**
- **Target marketing program enhancement**

Established goals and tactics for each strategic priority and metrics, timeline, and budget for several. Engaged members of the *More to Explore Working Group* in most of these sessions.

EDC BOARD Focus Group

ROADMAP FOR ECONOMIC DEVELOPMENT

BIG CHALLENGES

- ◆ UNIFY AS A REGION - HOW DO WE PUT THEM ON SAME TRACK?
- ◆ TRANSPORTATION - (LACK OF BRT PUBLIC TRANSPORTATION FOR RAIL DAILY COMMUTERS)
- ◆ GET ALL CITIES TOGETHER INTO 'ONE' ECON DEV PLAN
- ◆ LACK OF INFRASTRUCTURE HIGHER-END BUSINESS, e.g. AMAZON DIST.
- ◆ LACK OF FUNDING FOR EDC (OPERATIONS & ADMINISTRATION)
- ◆ BEACON COUNCIL EMPHASIS IS ON NORTH SIDE OF REGION
- ◆ SOUTH MIAMI DADE NEEDS TO BE HEARD, SEEN, VISIBLE
- ◆ INDUSTRY NOT LOCATED IN PROXIMITY TO HOUSING (129,000 COMMUTE NORTH)
- ◆ LACK OF IDENTITY / BRAND RECOGNITION
- ◆ DEFINE ROLE OF EDC

BIG OPPORTUNITIES

- ◆ DEVELOP MEDICAL CLUSTER & BIOMEDICAL & PHARMACEUTICALS
- ◆ LOW COST LAND FOR HOUSING DEVELOPMENT
- ◆ LARGE TRACTS OF LAND AVAILABLE FOR CORPORATE DEVELOPMENT
- ◆ OPPORTUNITY TO ATTRACT CORPORATE HEADQUARTERS
- ◆ MIAMI ZOO - EXPAND TO INCLUDE WATER PARK & MORE
- ◆ EXECUTIVE AIRPORT - DEVELOPMENT & ATTRACT BIZ LOCATIONS ON ADJACENT LAND
- ◆ BRINGING TECH TO AGRICULTURE
- ◆ HOMESTEAD AIR RESERVE BASE OPPORTUNITY & BRAC RISK
- ◆ GROWTH OPPORTUNITIES IN LOCAL R&D
- ◆ LEVERAGE LAND GRANT UNIVERSITIES

TOURISM & RETAIL

"ROADMAP FOR ECONOMIC DEVELOPMENT"

CHALLENGES

- ◆ TRANSPORTATION
- ◆ AIR BNB BOOK - NO TRANSPORTATION TO/FROM
- ◆ LACK OF SIGNAGE + TOURIST ATTRACTIONS
- ◆ PERCEPTION OF DISTANCE
- ◆ CHALLENGE TO MARKET - UNIQUE, DIVERSIFIED, MULTI-DIMENSIONAL OFFERINGS & AUDIENCE
- ◆ PARKS DOWN FINANCIALLY FOR YEARS BUT MANY ARE RE-INVESTING
- ◆ DISTANCE TO TRAVEL FROM POINT 'A' TO POINT 'B' - DRIVE & TRAFFIC

OPPORTUNITIES

- ◆ WINERIES
- ◆ FOOD MOVEMENT - 'FARM-TO-TABLE'
 - CHEFS USING LOCAL PRODUCE
 - REDLAND RAISED

OPPORTUNITIES/ADVANTAGES

- ◆ S. DADE - LAST UNTAPPED REGION
- ◆ SIX HOTELS COMING ON-LINE 2019
- ◆ MALL IS 'UNIQUE' - LEVERAGE VISITORS GOING TO THE KEYS
- ◆ DIAMOND IN THE ROUGH; FAMILY AREA
- ◆ DEVELOPMENT OF AGRI-TOURISM
- ◆ REGION OFFERS UNIQUE EXPERIENCES EXCITED ABOUT BEING IN NATURE!
- ◆ CVB SAYS VISITORS LOVE IT HERE
- ◆ MIA AIRPORT CONNECTED TO 150 NON-STOP DESTINATIONS GLOBALLY
- ◆ CREATE PROGRAMS TO ATTRACT FAMILIES
- ◆ HOMESTEAD TROLLEY TO PARKS, etc. BIG PLUS - NEED TO EXPAND BEYOND SEASONAL
- ◆ WELLNESS MOVEMENT - CAMPUS YOGA, MEDITATION
- ◆ WEDDING DESTINATION

EDC Board & Tourism/Retail
Opportunities & Challenges

What Stood out

- Need to unify as a region – How do we get all cities together into “ONE” economic development plan?
- BEACON Council emphasis is on north side of the region.
- South Miami Dade needs to be heard, seen, visible.
- Lack of identify / brand recognition.
- Atlantic Sapphire salmon farm is a game changer.
- Industry not located in proximity to housing (128,000 people commute north).
- Lack of funding for EDC.
- Large tracts of land available for corporate development; low cost land.
- Region offers unique experiences.
- Transportation infrastructure does not meet the needs of businesses or residents. Traffic and commute has become extreme.
- Diversified opportunities in Agriculture, e.g., wineries, wedding destinations, farm-to-table.
- Six new hotels coming on-line in 2019.
- Opportunity to develop medical cluster.

ECONOMIC DEVELOPMENT ROADMAP

BUSINESS & INDUSTRY FEEDBACK

PATTERNS & TRENDS

- ◆ PEOPLE GET EDUCATION HERE, THEN LEAVE
- ◆ EMPLOYEES LACKING SOFTSKILLS/LIFE SKILLS
- ◆ ERS HAVE TO TRAIN EES LONGER THAN IN OTHER LOCATIONS
- ◆ EES LACK ENGINEERING/TECHNICAL SKILLS
- ◆ LACK OF INFRASTRUCTURE IMPACTS EXISTING INDUSTRY & ABILITY TO ATTRACT NEW
- ◆ EXTREME POVERTY, LOWER SOCIOECONOMICS
- ◆ LAST PLACE W. LAND & EXPANSION OPPS YET NOT ATTRACTING INDUSTRY
- ◆ SALMON FARM - CAN BE A GAME CHANGER
- ◆ CITIES ARE 'SILOED' - NO IMPETUS TO WORK TOGETHER
- ◆ GREAT HOSPITAL
- ◆ GREAT SCHOOLS
- ◆ HARD TO RETAIN SKILLED WORKERS
- ◆ AG IS STILL 2ND ECONOMIC DRIVER FOR COUNTY & STATE
- ◆ QUALITY EMPLOYERS, PAYING GOOD WAGES ARE ATTRACTING & RETAINING QUALITY EMPLOYEES
- ◆ OTHER COMPANIES SAY HARD TO FIND EMPLOYEES
- ◆ TRANSPORTATION CHALLENGES
- ◆ AG INDUSTRY SEEING GROWTH IN NURSERIES; INCREASE IN PLANT SALES BEST IN 15 YRS.

- ◆ NEED STRONG, ENGAGED LEADERSHIP TO DECIDE HOW WE MOVE FORWARD WITH ECONOMIC DEVELOPMENT

..... KEY CHALLENGES WE WANT SOLVED

- ◆ PURSUE OPPORTUNITIES IN PHARMA R+D AND BIOMEDICAL
- ◆ MISSING LINK- NEED TO DEVELOP & ATTRACT GOOD PAYING INDUSTRIES
- ◆ NEED TO ATTRACT FOOD PROCESSING MANUFACTURING
- ◆ WOULD LIKE TO EDC FOCUS ON IMPROVING THE ENTIRE REGION - BE MORE INCLUSIVE
- ◆ WANT TO SEE BEACON MORE INVOLVED & PROMOTING S. MIAMI (PLACE A REP IN S. MIAMI DADE)
- ◆ NEED MORE YOUNG PEOPLE INVOLVED IN COMMUNITY AND ECONOMIC DEVELOPMENT
- ◆ PURSUE OPPORTUNITIES IN AG - MOBILE STORAGE FACILITIES, MEAT PROCESSING
- ◆ SOME CITIES NOT BUSINESS FRIENDLY; SLOW TO ACT
- ◆ EDC BE MORE EFFECTIVE - CLEAR MISSION; HELP INDUSTRIES GROW; NEED FUNDING; WANT TO SEE THEM BE MORE
- ◆ ADDRESS INFRASTRUCTURE ISSUES
- ◆ NEED A ROADMAP FOR WHAT PEOPLE WANT... THEN PULL THE TRIGGER... LOT OF "DISINTEREST"
- ◆ INFLUENCE MORE BUSINESS RESOURCE AGENCIES TO COME HERE

Business & Industry Interviews
Patterns & Trends / Challenges to solve

What Stood Out

- People get education here, then leave.
- Employees lack soft/life skills; lack engineering and technical skills.
- Cities are siloed.
- Great hospital; great schools.
- Hard to retain skilled workers.
- Ag is 2nd largest economic driver for the county and state.
- Quality employers paying good wages are successful in attracting and retaining quality employees.
- Need strong, engaged leadership to decide how we move forward with economic development.
- Want to see Beacon more involved in South Dade; place a representative here.
- Some cities not business friendly; also slow to act.
- Address infrastructure issues.
- Need to attract value-added manufacturing in agriculture.



WORK FORCE SOUTH MIAMI DADE



GOAL: IDENTIFY WORKFORCE NEEDS OF EMPLOYERS/RESOURCES & SERVICE PROVIDERS/
FOR EXISTING EMPLOYERS & TARGETED INDUSTRY SECTORS

TACTICS:

WORKFORCE - ~~EXISTING~~
INITIATIVE THAT
WILL
STRUCTURALLY UNEMPLOYED
& CHANGING W. LIVING
WAGE JOBS

COLLABORATE
WITH BEACON
ON BRIE -
JOINT CALLS
ON INDUSTRY

ESTABLISH
BIZ RETENTION &
EXPANSION PROGRAM

IDENTIFY
EMPLOYER
NEEDS
SURVEYS/INTERVIEWS

DEFINE WORKFORCE
NEEDS FOR TARGETED
INDUSTRY SECTORS
IDENTIFY SKILLS
GAPS

COMPLETE A
SKILLS
SURVEY OF
EXISTING
WORKFORCE

IDENTIFY
SKILLS GAPS
& PATH TO ADDRESS
GAPS

INVENTORY OF
RESOURCES &
SERVICE PROVIDERS

CREATE CENTRAL
SOURCE / D-BASE /
RESOURCE GUIDE
FOR BIZ & INDUSTRY

RESEARCH OTHER
WORKFORCE PROGRAMS
(REGION - FLORIDA - NATIONAL)
SUCCESSFUL MODELS

IMPROVE
PUBLIC SCHOOLS
IN S. MIAMI
& FLORIDA CITY TO
ATTRACT FAMILIES.

ATTRACT
WORKFORCE TO
THE REGION &
GROW EXISTING

• ATTRACT
MILLENNIALS TO
LIVE / WORK
HERE
PROMOTED LOW COST OF LIVING

ATTRACT MILITARY
WF/RETIRES TO
S. DADE

• ~~NEW~~ CORRIDOR
SMART PLAN IN
PLACE TO ATTRACT
W/F TO LOCATE &
COMUTE TO/FROM
HERE

Things to do
like a Doral
City Place.

- UP-SKILL EXISTING
WORKFORCE

EDUCATE
JR HIGH & HIGH SCHOOL
STUDENTS ON
PATHWAYS TO
JOBS/SCHOLARSHIPS

UTILIZE
"CAREER SOURCE"
TO HELP UNDERWRITE
TRAINING, EDUCATION,
WORK EXPERIENCE

IDENTIFY /
DEVELOP
APPRENTICESHIP
MODELS / PROGRAMS

NAV CAREER
TEAM ACADEMIES
EXPLORE FURTHER
LEVERAGING W. SCHOOLS

TEAM LEAD:

IDENTIFY TOP
SECTORS
TO FOCUS ON FOR
WORKFORCE DEV -
MILITARY - BIOMEDICAL
AG - RETAIL - TOURISM

MILITARY →
CIVILIAN
ATTRACT RETIREES &
PRIOR SERVICE INTO
S. DADE WORKFORCE COMMUNITY

FOCUS GROUP TEAM
RANDY
JAYNA
NAF

WHO SHOULD
BE INVOLVED:
- CAREER SOURCE
- HIGHER ED
- DADE COUNTY SCHOOLS
- TALENT DEV.
NETWORK

TEAM:

METRICS:

TIMELINE:

Talent Development & Attraction Focus Group

Talent Development & Attraction

Goal: Identify Workforce Needs of Employers / Resource & Service Providers for Existing Employers and Targeted Industry Sectors.

Tactics (sampling)

1. Initiative that will help structurally unemployed and connecting with living wage jobs.
2. Establish Business Retention & Expansion Program. Collaborate with BEACON on BR&E and joint calls on industry.
3. Survey/interview employers to identify workforce needs.
4. Define workforce needs for targeted industry.
5. Skills survey of existing workforce; identify skills gaps and pathways to address.
6. Attract millennials to live/work in South Dade.

INFRASTRUCTURE & SITE DEVELOPMENT

GOAL: Develop Infrastructure & Sites To Support Attraction of Business and Industry



TEAM LEAD:

TACTICS:

Identify the
key areas
that need
improvement
and develop
a plan to
address them

Stakeholder
engagement
process - develop
a plan to
engage them

Develop a
plan to
address the
key areas
that need
improvement

Identify the
key areas
that need
improvement
and develop
a plan to
address them

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Identify the
key areas
that need
improvement
and develop
a plan to
address them

TEAM:

METRICS

TIMELINE:

Infrastructure & Site Development
Focus Group

Infrastructure & Site Development

Goal: Develop Infrastructure and Sites to Support the Attraction of Business & Industry.

Tactics (sampling)

1. Identify top 5 to 10 sites throughout South Miami Dade; develop marketing strategy around those.
2. Utilize “Miami Dade Sites” for promoting available sites & buildings; encourage cities/county to post available sites.
3. Streamline permitting processes – city/county/state; Convene city managers & county to discuss ways to improve permit and approval processes.
4. Developing transportation infrastructure is key to attracting workforce and business.
5. Develop case studies of success, e.g., Atlantic Sapphire, FedEx Ground Distribution.
6. Economic SWAT team; to expedite site location projects and propose solutions; BEACON expedited permitting process?

ENTREPRENEURIAL ECOSYSTEM DEVELOPMENT

GOAL: Increase awareness to free resources locally.

TACTICS:

Advocate
for local
Beacon
Presence

Utilize the Grants
more to assist
business owners
and entrepreneurs.

Small Business
Week
Specifically for
SOUTH DADE

Offering more collaboration
between community
resources to provide
quarterly technical
assistance workshops
to small business
community.

Collaborate with
local municipalities &
federal agencies, each
to provide a one stop
stop for where to go,
who to go to and what
they offer. EDC website
/ gate keeper.

TEAM LEAD:

WHO SHOULD BE
INVOLVED:

Time line:

reach out to
them within 90
days to start
including South
Dade community.

within
4 months

June 2020

mid to late Sep 18
1*, then quarterly

6 months

PARTICIPANTS:

TEAM: Lisa Green, Jhyna Arauco, Tina Davis

METRICS:

TIMELINE:

BUDGET: In Kind administrative assistance
In Kind space for Beacon representative

Entrepreneurial Ecosystem Development

Entrepreneurial Ecosystem Development

Goal: Increase awareness to free resources locally.

Tactics (sampling)

1. Advocate for local BEACON presence.
2. Utilize the Chambers of Commerce to assist business owners and entrepreneurs.
3. Create Small Business Week specifically for South Dade.
4. Offering more collaboration between community resources to provide quarterly technical assistance workshops to small business community.
5. Collaborate with local municipalities, federal agencies, county to provide a One Stop Shop for where to go, who to go to and what they offer. EDC website / gate keeper.

TARGET INDUSTRY & CLUSTER DEVELOPMENT

GOAL: DIVERSIFY THE ECONOMY; BUILD CRITICAL MASS; OPPORTUNITY; CREATE BROAD RANGE OF OPPORTUNITIES;
BUILD UPON EXISTING STRENGTH; IMPROVE STANDARD OF LIVING; SUSTAINABLE IN LONG-TERM; ENVIRONMENTAL;

TEAM LEAD:

TACTICS:

cluster analysis
what makes sense
for what?
economic analysis in grant
proposal

TARGETS
- BIOMEDICAL
- NUTRITIONAL

marketing ↑ data-driven

training & education
(connectivity)

HAVE SOMEONE
FUNDING WORK
EDC TO KEEP
VISION GOING & IN
CHECK

SOLAR
MANUFACTURING/
INSTALLATION/
MAINTENANCE

CREATE MESSAGE
TO WHY
COMPANIES WANT
TO COME TO SOUTH
DADE

INDUSTRIAL
HEMP

TARGET
MARKETING
CAMPAIGN

WORK WITH
REGIONAL CLIMATE PLAN
SEA LEVEL RISE &
CLIMATE CHANGE
RESILIENCE
- THE CLUSTER GROUP
& UF

metrics

TEAM:

METRICS: MEASURE JOB GROWTH IN TARGET INDUSTRIES, NEW BIZ STARTUPS, DIVERSITY OF BUSINESS GROWTH (ALL INDUSTRIES GROWING); MEASURE INCREASE IN WAGES/INCOME; CAREER SOURCE # OF PLACEMENTS; MEASURE STUDENTS (40%) THAT GRADUATE & STAY IN INDUSTRIES IN S. DADE

TIMELINE: Research Resources & marketing with the 40% improvement goal (reduction of the 40%) / 8 3 yrs out measure of success

BUDGET: ~ \$300,000 for grant need \$250,000 marketing \$250,000 community and grant staff

Young BANCROFT
Sean (Dad) McCRACKEN
Anson, James Wood
Carolina Vendrame - University of Florida - IFAS-TRF
Jorge Abreu - Dade County Farm Bureau

WHO SHOULD BE INVOLVED:

Local organizations
- Farm Bureau
- Chamber

Target Industry & Cluster Development

Target Industry & Cluster Development

Goal: Diversity the economy; Build critical mass & opportunity; Build upon existing strengths; Improve standard of living; Sustainable in long-term & environmental.

Tactics (sampling)

1. Cluster analysis – what makes sense for who?
2. Target biomedical; nutritional, solar manufacturing/installation/maintenance, industrial hemp; sea level rise & climate change research.
3. Create message for “Why companies want to come to South Dade”; Target marketing campaign.
4. Training and education (connectivity).
5. Have someone funded under EDC to keep vision going & in check.

TARGET MARKETING PROGRAM ENHANCEMENT

GOAL:

TACTICS:

TEAM LEAD:
EDC

IDENTIFY
TARGET POPULATION
THAT MAY WANT TO
COME TO SDGE

Attract artists &
Small Biz

Promote real
estate in South
Dade

Destination
for Health &
Wellness

Market to
Gen C*
Genera's Groups to
discuss Ideas

Create A Signature Event
that is a major draw
E.g. Miami Gardens

Target:
Visitors from Specific
Countries that frequently
vacation in Fla. - Germany
Ireland, England

Work together with
EDCs, Government and
CHAMBERS to create a
cohesive marketing plan to
local and international business
community

Target:
New Businesses that
bring in transit employees
- Airlines
- Insurance
- Healthcare

South Dade the
"hub" of Biz
→ Environment of
→ Tech Industry
→ Film & TV
→ Film & TV

Collaborate w/ *
GMCVB's Culture
Dir to develop
an Artists in Residence
Program using hotels
as temp residence

Tactics:
- Think of different
instead of big labels
think B&B - Small business
Focus on different types of
Crafts, Arts, etc.

Capitalize on
market to NASCARE/PSO
customers

PROMOTE
Sports & Entertainment
sub-sectors
opportunities
WFLA
WFTS
WTVT

PROMOTE
TECH & Agriculture

Market to
Millennials
& Younger

GMCVB WILL
DO IT!
Cultural Arts
Council
for S. Dade

* Leverage established
events
- Poetry readings
- Music performances

GOAL: CONSISTENT
ATTRACT BUS. TO THE AREA THRU
MARKET AREA'S ASSETS
TO LOCAL COMMUNITY, AREA
OUTSIDE OF S. DADE, AREA
OUTSIDE OF S. FLA, THE WORLD
USING MULTIPLE PLATFORMS

TEAM: THE CHAMBERS, GMCVB, BUS. ASSN., BEACON COUNCIL, CITIES, COUNTY, CITEZ & CIVIC VOLUNTEERS

METRICS: # JOBS CREATED, # CAPITAL INVESTMENT, ↑ PROPERTY VALUES, VISIBILITY OF AREA IN PUBS, # OF VISITORS, PUB. RECOGNITION

TIMELINE: AS SOON AS IT'S FUNDED

BUDGET: \$100,000 INITIALLY

G. Marti
E. Moss
J. FORTY FORTY TONY NOON
NICOLE
D. Gonzalez

Target Marketing Program Enhancement

Target Marketing Program Enhancement

Goal: Attract business to the area through consistent marketing of area's assets to local community, area outside of South Dade, areas outside of South Florida, the World using multiple platforms

Tactics (sampling of 18 total)

1. Identify target population to attract.
2. Attract arts and small business.
3. Create a signature event, e.g., Miami Gardens.
4. GMCVB expand Cultural Arts Council for S. Dade.
5. Market to Gen "C" / generate groups to discuss ideas.
6. Destination for Health & Wellness.

Research & Development Capacity Building

Goal: *Build Research Capacity to Support Development / Growth*

Tactics

- Inventory / survey of existing R & D capacity.
- Send out to the community.
- Bring in various potential partners (see survey results for vision).
- From partners, champion each, and formulate plan for discussion (taskforce).
- Bring plan back to town hall for approval.
- Technocrats or consultants look at plan/vision to put P&P/budget in place.

Metrics:

- From baseline of available, applicable R&D, see an increase of xxx% per year.
- Set target of 1-3 successful grants per year. (college, university, city, county, state, feds)
- Ultimate goal the creation of a tech / bio park across the corridor.

What's Next?

Roadmap for Economic Development

Important to remember

**3. Takes time, yet
with focused action
you will see results in
short-term**

**1. Focus on what you
are good at to get
started**

**2. Success short-
term
implementation
creates positive
momentum**



Thank you!

Sandy Pratt, CEcD, FM

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APPENDIX B

TIER 1, 2 & 3 RANKED SITES

Tier 1 Sites By Municipality or Unincorporated County

Folio Number	Municipality	Rank (higher number = higher rank)
1079080000570	Homestead	35
1079110000030	Homestead	33
1079170010290	Homestead	34
1079180010030	Homestead	32
1079180010141	Homestead	33
1079180010150	Homestead	33
1079180010180	Homestead	33
1079180010190	Homestead	33
1678240280010	Florida City	34
1679300010320	Florida City	37
1679300010360	Florida City	37
1679300010440	Florida City	30
3050160330110	Unincorporated County	33
3050160450020	Unincorporated County	33
3050160450030	Unincorporated County	33
3050160450040	Unincorporated County	33
3050160480010	Unincorporated County	33
3050160480010	Unincorporated County	33
3050160480021	Unincorporated County	33
3050160480040	Unincorporated County	33
3050160480050	Unincorporated County	33
3059050290020	Unincorporated County	32
3059130000040	Unincorporated County	32
3059130000041	Unincorporated County	34
3059130000042	Unincorporated County	34
3059130000042	Unincorporated County	34
3059130000042	Unincorporated County	32
3059130000042	Unincorporated County	32
3059130000042	Unincorporated County	32
3059130000042	Unincorporated County	30
3059130000044	Unincorporated County	34
3059130000120	Unincorporated County	32
3059130000130	Unincorporated County	32
3059130040010	Unincorporated County	32
3059130040020	Unincorporated County	34
3060300040010	Unincorporated County	34
3069230000030	Unincorporated County	31
3069230000760	Unincorporated County	37
3069230000770	Unincorporated County	34
3069230000770	Unincorporated County	31
3069230000810	Unincorporated County	35
3069230001040	Unincorporated County	34
3069230001040	Unincorporated County	34
3069230001040	Unincorporated County	34
3069230001040	Unincorporated County	34

Tier 1 Sites By Municipality or Unincorporated County

Folio Number	Municipality	Rank (higher number = higher rank)
3069270000010	Unincorporated County	35
3069270000030	Unincorporated County	35
3069270000031	Unincorporated County	35
3069270000040	Unincorporated County	36
3069270000240	Unincorporated County	36
3069270000270	Unincorporated County	30
3069270000271	Unincorporated County	31
3069270000274	Unincorporated County	33
3069270000275	Unincorporated County	30
3069270000276	Unincorporated County	30
3069270000351	Unincorporated County	32
3069270080010	Unincorporated County	34
3069270150010	Unincorporated County	35
3069330080120	Unincorporated County	36
3079020000111	Unincorporated County	31
3079020000112	Unincorporated County	31
3079020000120	Unincorporated County	31
3079020000140	Unincorporated County	32
3079020000410	Unincorporated County	32
3079030360010	Unincorporated County	32
3079110000010	Unincorporated County	31
3660070000546	Cutler Bay	32
3660070000547	Cutler Bay	32
3660070000620	Cutler Bay	32
3660070000660	Cutler Bay	32
3660070200010	Cutler Bay	32
3660070200019	Cutler Bay	32
3660070200020	Cutler Bay	32
3660070200020	Cutler Bay	32
3660070200021	Cutler Bay	32
3660070200023	Cutler Bay	35
3660070200025	Cutler Bay	32
3660070200040	Cutler Bay	32
3660070210010	Cutler Bay	32
3660070210020	Cutler Bay	35
3660070210030	Cutler Bay	32
3660070240010	Cutler Bay	32
3660070240020	Cutler Bay	32
3660070300010	Cutler Bay	37
3660070300020	Cutler Bay	35
3350320550010	Palmetto Bay	34

Tier 2 Sites By Municipality or Unincorporated County

Folio Number	Municipality	Rank (higher number = higher rank)
3660160000027	Cutler Bay	29
3660090060010	Cutler Bay	29
3660090060012	Cutler Bay	29
1678230000010	Florida City	26
1678230000025	Florida City	27
1678230000026	Florida City	24
1678230000150	Florida City	24
1678230000215	Florida City	23
1678230000020	Florida City	21
1678230000220	Florida City	21
1678230000210	Florida City	21
3350350130010	Palmetto Bay	25
3350240180010	Palmetto Bay	23
1079210010050	Homestead	29
1079210010230	Homestead	29
1079210010230	Homestead	29
1079210110025	Homestead	29
1079210110040	Homestead	29
1079210110050	Homestead	29
1079210110080	Homestead	29
1079220010110	Homestead	29
1079220010120	Homestead	29
1079220010140	Homestead	29
1079270010015	Homestead	29
1079270010065	Homestead	29
1078230000110	Homestead	28
1079160022890	Homestead	28
1079210010233	Homestead	28
1079210110060	Homestead	28
1078230000120	Homestead	27
1079220010071	Homestead	27
1079220010160	Homestead	27
1079230010022	Homestead	27
1079230010023	Homestead	27
1079220010172	Homestead	26
1078140001020	Homestead	24
1078110020020	Homestead	23
3059220000013	Unincorporated County	29
3059220710010	Unincorporated County	29
3059220730120	Unincorporated County	29
3069140010010	Unincorporated County	29
3069230000210	Unincorporated County	29
3069270000300	Unincorporated County	29
3069330000130	Unincorporated County	29
3069330000721	Unincorporated County	28
3059220730010	Unincorporated County	27
3059220730020	Unincorporated County	27
3059220730030	Unincorporated County	27

Tier 2 Sites By Municipality or Unincorporated County

Folio Number	Municipality	Rank (higher number = higher rank)
3059220730040	Unincorporated County	27
3059220730050	Unincorporated County	27
3059220730060	Unincorporated County	27
3059220730070	Unincorporated County	27
3059220730080	Unincorporated County	27
3059220730090	Unincorporated County	27
3059220730100	Unincorporated County	27
3059220730110	Unincorporated County	27
3069110000361	Unincorporated County	27
3069120000130	Unincorporated County	27
3069230000400	Unincorporated County	26
3069230000435	Unincorporated County	26
3069230000530	Unincorporated County	26
3069270000310	Unincorporated County	26
3069270000325	Unincorporated County	26
3078010000581	Unincorporated County	26
3079060000360	Unincorporated County	26
3059220660010	Unincorporated County	25
3069110000350	Unincorporated County	25
3059220710020	Unincorporated County	24
3059330000190	Unincorporated County	23
3069220000450	Unincorporated County	23
3069230000940	Unincorporated County	23
3069230001040	Unincorporated County	23
3069140000460	Unincorporated County	21
3069140000520	Unincorporated County	21
3069310000260	Unincorporated County	21
3069310000300	Unincorporated County	21
3069310000332	Unincorporated County	21
3078140001000	Unincorporated County	21
3078230000180	Unincorporated County	21
3078230020040	Unincorporated County	21
3078260000010	Unincorporated County	21
3078260000020	Unincorporated County	21
3078260000050	Unincorporated County	21
3078260020010	Unincorporated County	21
3078260020020	Unincorporated County	21
3078260020030	Unincorporated County	21
3078270000020	Unincorporated County	21
3078270000030	Unincorporated County	21
3078270000031	Unincorporated County	21
3079060000280	Unincorporated County	21
3079060000295	Unincorporated County	21
3079060000310	Unincorporated County	21
3079060000330	Unincorporated County	21
3079060000580	Unincorporated County	21
3079060040010	Unincorporated County	21
3079060040030	Unincorporated County	21

Tier 3 Sites By Municipality or Unincorporated County

Folio Number	Municipality	Rank (higher number = higher rank)
1079210110030	Homestead	19
1078020000285	Homestead	17
1078110000070	Homestead	17
1078110000081	Homestead	17
1078110020010	Homestead	17
1078020000280	Homestead	14
3069310000330	Unincorporated County	18
3078110000150	Unincorporated County	17
3078140000990	Unincorporated County	16
3078220000120	Unincorporated County	16
3078220000121	Unincorporated County	16
3078220000122	Unincorporated County	16
3078230000181	Unincorporated County	16
3078230000182	Unincorporated County	16
3078230000183	Unincorporated County	16
3078230000200	Unincorporated County	16
3078230010020	Unincorporated County	16
3078230010040	Unincorporated County	16
3078020000290	Unincorporated County	12
3078110000090	Unincorporated County	12

APPENDIX C

LITERATURE REVIEW SUMMARY

Document Title: *South Dade Transitway Corridor – Land Use Scenario & Visioning Planning*

Document Date: *October 2019*

Organization: *Miami-Dade Transportation Planning Organization*

Consultant/Author: *Calvin Giordano & Associates, Inc.*

Category: *Transportation*

Document Description

Develop a Land Use Scenario & Visioning Plan for the South Dade Transitway Corridor (formerly known as South Dade Busway) and to provide the technical basis for the development of transit supportive land uses for the South Dade Transitway Corridor. The goal of this project is to facilitate the movement of a greater number of passengers than currently exists to and from South Miami-Dade to the urban core of Downtown Miami.

Potentially Relevant Findings/Conclusions For South Dade Economic Development Strategy

- Limits of the Study extend for approximately 20 miles from SW 344th Street on the south terminus to the Dadeland South Metrorail Station
- The southern portion of Miami-Dade County has the fastest population growth in the County and is projected to experience a 50 percent increase in population and 65 percent increase in employment by 2040.
- Once completed, BRT will provide rail-like travel time, 15 iconic stations, level boarding through all doors, and pre-paid fares for speedy access.
- Study recommends general land use policy changes that, if adopted, will permit increases in non-residential intensities and therefore employment opportunities within certain Station Areas along the South Dade Transitway Corridor
- While the stated objective of investing in an improved BRT line is actually somewhat antithetical to economic development/job creation in South Dade (to facilitate the movement of a greater number of passengers than currently exists to and from South Miami-Dade to the urban core of Downtown Miami) in fact the plan provides estimates for job creation within ½ mile of 7 of the 15 stations (even under the most conservative growth scenario) through 2040 which are in excess of 950 net new jobs. These include SW 136th Street, Palmetto Bay, Cutler Bay/Southland Mall, SW 244th Street, SW 264th Street, Downtown Homestead, and at the terminus in Florida City.
- Job creation around stations will be consolidated in a number of industries: retail, restaurants, health services, and professional services.
- Based upon analysis in the plan, job creation around the stations will serve as a significant proportion of the entire South Dade region's employment growth through 2040 if the land use modifications noted by the plan are implemented.

Document Title: *Downtown Village of Palmetto Bay Economic & Market Assessment*

Document Date: *2017 (update of 2014 analysis)*

Organization: *Village of Palmetto Bay*

Consultant/Author: *Lambert Advisory*

Category: *Downtown Development Market Study*

Document Description

In 2014, the Village completed an economic and market analysis associated with the Village of Palmetto Bay Downtown Master Plan. A key objective of the 2014 Assessment was to identify the opportunity for mixed-use development which emphasized a sense of place and destination for the residents of the Village of Palmetto Bay. In late 2017, Palmetto Bay reengaged its consultant to provide an update to the 2014 Assessment. One notable difference between the 2014 Assessment and the update was the inclusion of potential hotel development within the Downtown and/or surrounding US 1 corridor study area.

Potentially Relevant Findings/Conclusions For South Dade Economic Development Strategy

- Downtown Palmetto Bay is well positioned and has received the funding for infrastructure improvements to make it one of the few areas along the transit corridor to support a significant amount of new development in the near term depending upon regulatory constraints.
- Demand for office to be in the range of 110,000 and 230,000 square feet during the 5+ year period following 2017.
- Demand for 20,000 to 30,000 square feet of retail space can be supported as part of the initial development phase including dining establishments, smaller (boutique) shops, and limited service convenience. Also an opportunity to attract a modest sized grocery store within the next 5+ years which is based upon steady population
- May be an opportunity for a 100+ to 120+ room select service hotel to be demanded within the Downtown area toward the latter stages of the ten-year timeline (2017-2027).

Document Title: *Miami-Dade County Retail/Entertainment District Assessment*

Document Date: 2011

Organization: *Miami-Dade County*

Consultant/Author: *Lambert Advisory*

Category: *Retail/Tourism*

Document Description

Miami-Dade County Board of County Commission Resolution 871-09 called for a study of the opportunity to designate and promote a Retail/Entertainment District (RED) within the County. The six objectives of the study were: To determine market viability of a RED within Miami-Dade County; To determine the market viability of the RED specifically in an area west of Miami International Airport (MIA) which had been designated by the County as the principal location for the district; To recommend changes in land use regulations to accommodate the RED in the identified area which generally lies between the Dolphin and International Malls; To assess the improvements needed to transportation associated with the RED with particular focus on the area between the Dolphin and International Malls. To identify the positive or negative market and economic implications to other major retail centers of the development of the RED; and, To identify how government may play a broader role than only amending land use regulations to serve as a catalyst for the development of the RED.

Potentially Relevant Findings/Conclusions For South Dade Economic Development Strategy

- Study is dated but several findings still relevant in current market context.
- Study was the first assessment to determine that nearly ½ of all sales in Miami-Dade County retail were the result of visitors to Miami-Dade particularly Latin American and Caribbean international visitors which lack reasonably priced access to American goods in their home markets. In this context the retail market in Miami-Dade is unique within an American context with the potential exception of cities in proximity to the border with Mexico which have less affluent shoppers.
- As a result of the profile of shoppers, Amazon and other online retail has had less of an impact on bricks-and-mortar retail in Miami-Dade than most other areas of the country.
- While the study indicated the strength of the retail sector and demand for tremendous future growth at the time, it also found a nearly wholesale lack of family entertainment in the Miami-Dade market which the Future of Retail Roundtable held as part of the report indicated would be a critical economic driver in the future when married with retail activity. Some of this lack of family entertainment was the result of the relative proximity of Orlando, the strongest family entertainment destination in the world, but the study clearly identified an opportunity for additional investment in retail.

Document Title: *2018 Visitor Industry Overview*

Document Date: 2019

Organization: *Greater Miami and the Beaches CVB*

Consultant/Author: GMCVB

Category: *Tourism*

Document Description

Annual research report of visitor trends, expenditures, hotel performance and other metrics to determine the health of the Miami-Dade visitor market and submarkets.

Potentially Relevant Findings/Conclusions For South Dade Economic Development Strategy

- 16.5 million overnight visitors and 6.8 million day trippers in 2018;
- Heavily weighted to vacation/pleasure and family visits particular for international and domestic out of state. Less so for FL residents who visit for a wider range of reasons;
- Large majority of visitors stay in hotels;
- South Miami-Dade is only the destination for 11% for both international and non-Florida visitors but 23% of Florida residents;
- Uber/Lyft are growing in importance. Have already overtaken rental cars for domestic visitors and increasing among international visitors. This trend could be concerning for South Dade given the distances involved;
- South Dade is visited by 29% of international visitors, 14% of non-FL domestic visitors, and 31% of FL resident visitors;
- Everglades Biscayne National Park and Zoo Miami, all in South Dade are popular attractions/destinations with the Everglades and Zoo Miami being the 3rd and 4th most visited attractions after Lincoln Road and Bayside Marketplace;
- South Miami-Dade is the 3rd most visited area behind Miami Beach and Downtown Miami for overnight visitors;
- South-Miami Dade submarket hotels continue to have among the lowest ADR and occupancies in the entire Miami-Dade market

Document Title: *Resilient 305 Strategy*

Document Date: *2019*

Organization: *Miami-Dade County*

Consultant/Author: *Miami-Dade County Office of Resilience*

Category: *Economic Development*

Document Description

This document is intended to address resilience challenges through intergovernmental and community collaboration. This resilience strategy will build on our existing networks and endeavor to safeguard our people, our homes, and our livelihoods, so that no person, neighborhood, or business is left behind. GM&B's Resilience Strategy—the Resilient305 Strategy—has been created as a living document to address prioritized resilience challenges through intergovernmental and community collaboration. Often referred to by our area code, the “305” has become a common nickname for local efforts. Not all our challenges will be addressed through actions in this resilience Strategy. Some of the issues are already being tackled by other plans or entities, such as decreasing congestion and improving transit through the Strategic Miami Area Rapid Transit (SMART) Plan, mental health through the new Miami Center for Mental Health and Recovery and the work of many social service providers and initiatives, and affordable housing through in-development Affordable Housing Master Plans. The resilience challenges tackled in Resilient305 were identified through a rigorous process that included extensive stakeholder engagement.

Potentially Relevant Findings/Conclusions For South Dade Economic Development Strategy

Over 50 actions have been identified, developed and organized for the Resilient305 Strategy into three overarching goal areas: Places, People, and Pathways. To better define the actions that would be included in the strategy, The report focuses on opportunities where we were best positioned to move the needle and separated them from those where we were better suited to complement the exceptional work that is already being done throughout various communities in the region. Several of these initiatives affect future development and economic development for South Dade.

Document Title: *Tomorrow's South Dade*

Document Date: *March 2015*

Organization: *CenterState Bank, Homestead Hospital, City of Homestead, City of Florida City*

Consultant/Author: *The Consulting Group of South Florida, Inc./Lambert Advisory*

Category: *Economic Development*

Document Description

TOMORROW'S SOUTH DADE is a community driven effort to provide a vision for the future of the South Dade region over the next several decades. TOMORROW'S SOUTH DADE brought together over 200 individuals who have an interest in the betterment of the South Dade community through a series of committee meetings between July and October of 2014.

Potentially Relevant Findings/Conclusions For South Dade Economic Development Strategy

South Dade, as compared to other portions of Miami-Dade County has a uniqueness rooted in the history of the area based in agriculture, the existence of two national parks and its associated tourism and other natural assets, and the military. These assets need to be protected and enriched as they will continue to drive the future of the area.

- South Dade must develop a marketing plan that properly reflects its uniqueness and quality of life. A plan is needed that will reverse the perception that has gone on for too long, that South Dade is only an affordably-priced housing community.
- South Dade should be more sustainable from an economic perspective and work closer with all economic development organizations in the County to bring jobs to the community.
- South Dade needs a mechanism for communication at the community and civic levels in order to create one voice for the area

Document Title: *South Dade Success Plan: Year One Mid-Year Report (SDSS1)*

Document Date: *July 2016*

Organization: *Miami-Dade County Commission District*

Consultant/Author: *District 8 Staff*

Category: *Economic Development*

Document Description

In June 2015 community leaders from South Dade gathered at the invitation of two South Dade County Commissioners, Daniella Levine Cava and Dennis Moss, to review some of the major challenges and opportunities. The first ever South Dade Solutions Summit was an enlightening and productive day of facilitated learning and problem-solving. Participants knew that working together we could help our community thrive. The participants set priorities for action and agreed to stay involved to turn the goals into reality.

Potentially Relevant Findings/Conclusions For South Dade Economic Development Strategy

Goal 1: Enhance our Parks; Protect our Environment and Open Space

Objective 1: Educate the Public.

Knowledgeable residents working with elected officials are the key to creating and maintaining an excellent park system and healthy environment.

Objective 2: Reduce Urban Sprawl.

South Dade includes beautiful open space and family-friendly neighborhoods. Retaining these unique characteristics will protect our quality of life and special allure.

Objective 3: Protect and enhance existing assets.

We have much to build upon in South Dade and need to assure that these assets are maintained and enhanced.

Goal 2: Improve South Dade's Economy

Objective 1: Create Jobs in South Dade.

Creating more jobs in South Dade can reduce the number of commuters wasting time in traffic, improve our quality of life and stimulate our local economy.

Objective 2: Promote Agriculture.

Agriculture is Miami-Dade's second economic driver, so it needs our support, in an increasingly competitive environment, to stay strong.

Goal 3: Improve Transportation

Objective 1: Creative funding for transit.

New funds are needed to improve our public transit.

Objective 2: Improve Transit Options.

The best solution for reducing traffic is to reduce the number of cars on the road.

Objective 3: Improve roads, bike paths and infrastructure.

Existing roads, bridges, bike paths and other amenities need enhancement and maintenance.

Document Title: *South Dade Solutions Summit 2*

Document Date: *July 2016*

Organization: *Commission District 8 and 9; GMCVB*

Consultant/Author: *Bruce Turkel/South Dade EDC (Diana Gonzalez)*

Category: *Economic Development*

Document Description

On July 15, 2016, Commissioners Daniella Levine Cava and Dennis C. Moss convened nearly 200 members of the South Miami-Dade County community at the Cutler Bay Town Hall to discuss a new branding campaign for South Dade. The day's goal was to design a new plan to effectively market South Dade's recreational and tourist amenities, quality neighborhoods and schools, and business development opportunities. Inviting attendees to "Look South!", Commissioners Levine Cava and Moss created a coalition to bring attention to the tremendous strengths of the South Miami-Dade region, and to create a shared brand and marketing plan that will catapult South Dade forward. In partnership with the Greater Miami Convention and Visitor Center, the focus of the summit was to establish a brand that will be used to market South Dade for tourism and economic development purposes. Bruce Turkel, CEO of TURKEL Brands, led a workshop, emphasizing the value of branding and how important it is to not only demonstrate the value of a product but also reach the consumer at an emotional, as well as, intellectual level.

Potentially Relevant Findings/Conclusions For South Dade Economic Development Strategy

This meeting resulted in the development and implementation of the SOUTH DADE MORE TO EXPLORE brand that was unveiled to the community in November of 2016.

Document Title: *South Dade Solutions Summit 3*
Document Date: *December 2017*
Organization: *Commission Districts 8 and 9*
Consultant/Author: *South Dade EDC/Diana Gonzalez*
Category: *Economic Development*

Document Description

The agenda of the SDSS3 was designed to provide sufficient information to the participants and to include time during which the participants could provide feedback and ideas on how they want to see South Dade develop. The purpose for the event was to:

- Identify what kinds of industry we want to see in South Dade
- Talk about strategies on how to get those industries here in South Dade

Potentially Relevant Findings/Conclusions For South Dade Economic Development Strategy

The primary outcome of the Summit was the direction to work with project partners, including the US Economic Development Administration to apply for grant funding for the creation of an Economic development Strategy for South Dade.

Document Title: *South Miami Dade...Roadmap for Economic Development*

Document Date: *August 10, 2018*

Organization: *IEDC*

Consultant/Author: *Sandy Pratt, TadZo Consulting on behalf of IEDC*

Category: *Economic Development*

Document Description

PowerPoint presentation prepared by Sandy Pratt as a result of a review of the South Dade EDC's efforts to develop an economic development strategy for south Dade. Ms. Pratt's process included:

- Interviews with business leaders and chambers of commerce - Discussed patterns and trends opportunities; and challenges they want solved.
- Tour of Accelerate Dade Incubator - Gather information on entrepreneurial assets, training, funding, and other resources. Overview of entrepreneurship activity occurring in the region. Discuss any gaps in services/resources.
- Meeting with Commissioner Dennis Moss - County perspective and landscape for economic growth.
- Focus and Working Group sessions for the following strategic priorities:
 - Talent Development and Attraction
 - Infrastructure and Site Development
 - Targeted Industry Development and Cluster Development
 - Research and Development Capacity Building
 - Entrepreneurial Ecosystem Development
 - Target Marketing Program Enhancement
- Established goals and tactics for each strategic initiative and also metrics, timeline, and budget for several. Engaged members of the More to Explore Working Group in most of these sessions.
- Report-out and presentation to the EDC
- Recommendations on priorities and next steps

Potentially Relevant Findings/Conclusions For South Dade Economic Development Strategy

- Need strong, engaged leadership to decide how we move forward with economic development.
- Pursue opportunities in Pharmaceutical R&D and Biomedical.
- Missing link: Need to develop & attract good paying industries.
- Pursue opportunities in Agriculture, e.g., meat industry/mobile processing/storage facilities; need to attract food processing manufacturing.
- Want to see BEACON Council more involved and promoting the South Miami Dade region; place a representative here
- Would like EDC to focus on improving the entire region; be more inclusive.
- Need more young people involved in community and economic development.
- Some cities not business friendly; slow to act.
- EDC be more effective; needs a clear mission; help industries grow; needs funding; want to see them be "more".
- Address infrastructure issues.
- Need a roadmap for what people want; pull the trigger; seeing a lot of "disinterest".
- Influence more business resource agencies to come here.

Document Title: *Destination Miami Greater Miami and the Beaches Strategic Plan 2020-2025*

Document Date: *October 2019*

Organization: *Greater Miami Convention and Visitors Bureau*

Consultant/Author: *InterVISTAS and MMGY NextFactor*

Category: *Tourism*

Document Description

The Strategic Plan for Greater Miami and the Beaches is a 5-year roadmap to outline how the local tourism and hospitality industry can navigate a future ripe with new opportunities amid those challenges.

Potentially Relevant Findings/Conclusions For South Dade Economic Development Strategy

The ultimate deliverables in the Greater Miami Strategic Plan, resulting from extensive community engagement sessions, are six primary strategic goals supported by more than 40 actionable initiatives for the GMCVB to focus on in the next five years. The strategic goals are:

- Strategic Sales & Marketing
- Proactive Destination Management
- Improved Hospitality Culture
- Enhanced Mobility
- Stronger Community Alignment
- Long-Term Organizational Sustainability

Gaps and opportunities include:

- Collaborate more intentionally with a broader spectrum of local communities to inform destination development.
- Expand the destination brand to be more community-driven and evolve it to embrace technology, innovation and sustainability.
- Local organizations and academic institutions need more support to improve workforce development and retention in Miami-Dade County.
- A greater cross-section of local communities must be engaged more significantly to address some residents' negative perception of tourism and its impact on quality of life.
- Considerable amount of varied experiences/offerings exist county-wide; promoting and developing awareness will attract and build new visitor segments
- Culinary, culture, music and art scene county-wide is underdeveloped and could be leveraged
- The nascent organic farming and agri-tourism segment should be promoted
- Low awareness of county-wide offerings/experiences among visitors and locals
- Protecting natural assets and ensuring sustainability (economic, social and environmental)
- Not enough convention space for smaller events with hotel
- Need to expand hotel offerings throughout all Communities
- Leverage and promote existing attractions and events across the region: South Beach Wine & Food Festival, Homestead Stone Crab & Seafood Festival
- Promote all neighborhoods throughout Miami-Dade County
- Unique local agricultural food products
- County-wide collaboration and local community support must be improved to permit growth.
- The GMCVB should elevate its partnerships with key stakeholders to push initiatives and educate the public about the economic benefits of the visitor economy and mega events.
- Greater Miami's unique diversity and culture must continue to be developed and promoted.
- Visitors want bespoke experiences. Greater Miami is one of the most diverse destinations in the world, which should be promoted across a broader spectrum of community organizations, events and neighborhoods.
- Economic development and tourism promotion should be more closely aligned with key sectors. The tourism industry should collaborate with economic development agencies, chambers of commerce, civic/cultural organizations and academia within a more structured framework to inform sustainable and equitable tourism development direction, leveraging Greater Miami's industry cluster strengths.

Document Title: *Miami-Dade County Defense Industry Cluster Study*

Document Date: *June 26, 2017*

Organization: *Miami-Dade Beacon Council*

Consultant/Author: *Research on Investment*

Category: *Military*

Document Description

The purpose of this study is to document defense-related contracting by Miami-Dade County businesses, current and recent, with a view to exploring the merits of adding select defense related industries as an additional focus area within the OCOG framework, especially given emerging growth trends in this arena. This report is intended as an exploratory factfinder to aid deliberations by the Miami-Dade Beacon Council: “Do select defense-related industry segments merit a dedicated initiative in terms of proactive economic development efforts?”

Potentially Relevant Findings/Conclusions For South Dade Economic Development Strategy

- **National Defense Spending is on the Rise**
After declining for several years in real terms, US defense spending has returned to growth. Following several years of declining defense budgets, FY2016 already saw a reversal of DoD contract spending in inflation-adjusted terms, increasing by 7% from the previous fiscal year, largely driven by increases in obligations for procurement of major weapons systems. Services and R&D funding showed some uptick as well. Future growth is likely to be driven by the incoming US administration’s increased focus on strengthening the US military: indeed, the FY2018 federal Budget proposal calls for a \$52 billion increase from the spending level in the annualized 2017 continuing resolution.
- **Florida is Capturing More Defense Spending but Miami-Dade is not Fully Participating in Industry Upswing**
In FY2016, the top 10 states receiving DoD funding (by place of performance) accounted for over 60% of domestic DoD spending, with Florida in 5th place for the first time since FY2011, gaining from 7th place in both FY 2014 and FY 2015. The top four states are California, Virginia, Texas, and Connecticut.
The economic benefits of DoD procurement spending in Miami-Dade County have notably declined since 2014. Department of Defense spending performed in the County, the basis for previous economic impact assessment of the local defense industries, including grants, loans and other financial assistance, dropped by 35% from \$389 million in FY2014 to \$252 million in FY2016. However, there is still unexplored potential in the area: Miami-Dade is well positioned in certain niche industries to link into the statewide defense-industry growth, especially through smaller sub-contracts.
- **Miami-Dade Has Potential to Expand its High-Tech Defense Contracting**
Though most business in Miami-Dade from DoD contracting in 2016 continued to be concentrated in clothing, medical services and supplies, fuels, maintenance/repairs, and transportation and logistics services, local expenditures advertising and engineering services have been increasing, while US Coast Guard / local DHS contracts have shown a rise in IT and Telecom spending.

Document Title: *Homestead Air Reserve Base Economic Impact*

Document Date: *January 3, 2019*

Organization: *Homestead Air Reserve Base*

Consultant/Author: *Homestead Air Reserve Base*

Category: *Military*

Document Description

As a pillar of the Homestead community, Homestead Air Reserve Base continues to be a major contributor to the economic growth of South Florida, generating over \$331 million into the local economy in fiscal year 2018 - a 50 percent increase since 2008, according to the base finance office.

Potentially Relevant Findings/Conclusions For South Dade Economic Development Strategy

The presence of Homestead Air Reserve Base has fueled economic growth in South Miami-Dade County for decades, dating back to the Homestead Army Air Field days in the 1940s.

- This includes more than \$185 million in construction, services and material contracts that were awarded to mainly local businesses.
- This economic increase is about \$18 million more than in 2018. The base's total economic impact has doubled since 2003 with no signs of slowing down.
- Currently, the base employs over 1,400 full-time employees who live in the Homestead and South Dade communities and another 1,700 Air Force reservists who drill monthly at the base. The 482nd Fighter Wing, an Air Force Reserve unit, is the installation host.
- Homestead ARB's total payroll for FY 2018 is in excess of \$99 million.
- The estimated number of indirect jobs created is 837.
- The military presence also directly impacts the local economy through many subtle, yet important, contributions. Auto fleet maintenance, linen and laundry service, purchases from local beverage distributors, grounds maintenance, and contracted electrical, painting and plumbing work are other examples of the direct economic impact on the local community, totaling in the millions of dollars.
- The base also spent more than \$559,000 in FY 2018 on local hotels. Many reservists stay off base in Homestead and Florida City during monthly unit training assemblies.

Document Title: *Economic Element of the CDMP*

Document Date: 2018

Organization: *Miami-Dade County*

Consultant/Author: *Miami-Dade County RER*

Category: *Economic Development*

Document Description

The overarching aims of the Economic Element are to expand and further diversify the MiamiDade economy, provide employment for all who want to work, and increase income and wealth. More specifically, the Element provides a set of goals and associated objectives and policies that will enhance Miami-Dade County government's contribution to the economic development of the area. The Element will serve as the general policy framework for economic development decisions and it will be the guide for operational activities, which influence economic development.

Potentially Relevant Findings/Conclusions For South Dade Economic Development Strategy

- GOAL II
PROVIDE PUBLIC INFRASTRUCTURE WHICH CONTRIBUTES TO ALL AREAS OF MIAMIDADE COUNTY WITHIN THE UDB IN ATTAINING THEIR SOCIO-ECONOMIC DEVELOPMENT POTENTIAL COMPATIBLE WITH OTHER CDMP GOALS.
 - Objective ECO-4
Develop a consolidated infrastructure plan, including streets and highways, water and sewer capacity, drainage and fire facilities, and other components especially advanced technology, such as fiber optics, appropriate to enhance socio-economic development 2 Policies
ECO-4A. The County will consider directing an appropriate executive office to review and evaluate infrastructure improvement and expansion plans, putting major emphasis on socio-economic development.
ECO-4B. Place high priority on acquiring adequate funding to carry out all projects of the current adopted Long Range Transportation Plan.
ECO-4C. Miami-Dade County will program infrastructure improvements in municipalities taking into account their socio-economic development priorities and overall County priorities.
ECO-4D. Infrastructure prioritization should consider needs of existing and target industries in industrial areas that do or can support these industries, especially along trade corridors and around trade hubs.
- GOAL III
INCREASE EMPLOYMENT AND INVESTMENT THROUGH PROGRAMMATIC ASSISTANCE TO BUSINESS AND LABOR FORCE DEVELOPMENT PROGRAMS, BOTH COUNTYWIDE AND FOR SUBAREAS.
 - Objective ECO-7
The County should develop a set of guidelines for close coordination between Miami-Dade socio-economic development functions and the primary local organizations having business attraction, expansion and retention program responsibilities, as well as with other non-local institutions, organizations and individuals interested in the economic development of the area.
ECO-7G. Any redevelopment option chosen for the conveyed land at the Homestead Air Reserve Base should not inhibit continued operations of military and Homeland Security units stationed at Homestead Air Reserve Base.

Document Title: *Miami-Dade County Strategic Plan*

Document Date:

Organization: *Miami-Dade County Office of Management and Budget*

Consultant/Author: *Miami-Dade County*

Category: *Economic Development*

Document Description

Miami-Dade County has had a strategic planning and performance measurement structure in place for more than 15 years. This approach is based on a countywide strategic plan that crosses several service delivery areas including Public Safety, Transportation and Mobility, Health and Society, Neighborhood and Infrastructure, Recreation and Culture, Economic Development and General Government services. Through annual business planning and budgeting, our departments align their activities to the strategic plan, identify the performance measures they will use to gauge success and seek the resources needed to execute their plans.

Potentially Relevant Findings/Conclusions For South Dade Economic Development Strategy

A strong economy creates jobs and opportunity for the entire community. It helps create vibrant, attractive urban centers and neighborhoods, where inviting shops and quality services are available. It improves property values and lifts incomes. Our County government partners with the private sector and municipalities to promote economic growth and generate jobs throughout the community. We operate Miami International Airport and the Port of Miami, two major economic engines. We fund and develop affordable housing and help families purchase homes. We promote Miami-Dade as a global gateway for international trade and tourism and as a filming destination and a production center for the entertainment industry. We provide opportunities for small businesses to compete for County contracts.

- Economic Development Goals and Objectives:
 - ED1: An environment that promotes a growing, resilient and diversified economy
 - ED1-1: Promote and support a diverse mix of industries vital to a growing economy
 - ED1-2: Create and maintain an environment friendly to businesses, large and small
 - ED1-3: Expand job training opportunities aligned with the needs of the local economy
 - ED1-4: Continue to leverage Miami-Dade County's strengths in tourism and international commerce
 - ED1-5: Provide world-class airport and seaport facilities
 - ED2: Entrepreneurial development opportunities within Miami-Dade County
 - ED2-1: Encourage creation of new small businesses
 - ED2-2: Expand opportunities for small businesses to compete for Miami-Dade County contracts
 - ED3: Revitalized communities
 - ED3-1: Foster stable homeownership throughout Miami-Dade County
 - ED3-2: Promote development in distressed communities to ensure long-term vitality

Document Title: *2017-2022 South Florida Comprehensive Economic Development Strategy*

Document Date: *November 27, 2017*

Organization: *South Florida Regional Planning Council*

Consultant/Author:

Category: *Economic Development*

Document Description

The South Florida Regional Planning Council (Council) is one of ten regional councils within Florida created to address issues and plan solutions that are greater than local scope, as well as providing input into state policy development, the Council also serves as the only multipurpose regional entity that is in position to plan for intergovernmental solutions to growth related problems, and meet other needs of communities in each region. The Council serves as the Economic Development District (EDD) for three counties: Broward, Miami-Dade, and Monroe Counties residents. EDDs serve as geographic districts for the US Economic Development Administration (EDA) to deploy various programs. EDA directs each designated Economic Development District to develop and maintain a Comprehensive Economic Development Strategy (CEDS) with the assistance of public involvement. A CEDS is a strategy-driven plan for regional economic development. A CEDS is the result of a regionally-owned planning process designed to build capacity and guide the economic prosperity and resiliency of an area or region. Economic Development Districts are required to fully update the CEDS every five years and can update the CEDS on an annual basis. This update includes five main sections:

- Summary Background of the economic conditions in the region;
- SWOT Analysis to identify strengths, weaknesses, opportunities, and threats;
- Strategic Action Plan incorporating tactics identified through the planning process, other regional plans, and stakeholder feedback to develop priority strategies for the region;
- Evaluation Framework to identify and monitor performance measures associated with the plan;
- and Economic Resilience.

Potentially Relevant Findings/Conclusions For South Dade Economic Development Strategy

The Action Plan for the CEDS is organized around the following 3 goals:

Goal #1: Innovation and Competitiveness

Objectives: Invest in small business training and incubators

- o Support efforts by higher education institutions and others by providing technical support and support grant opportunities and the development of venture capital.

- Coordinate activities regarding all Goals to enhance the workforce and employment opportunities

- o Coordinate data sharing, communication with partners regularly to ensure that data needs are met

Goal #2: Opportunity and Prosperity

Objective: Invest in public infrastructure and retain industrial and developable parcels

- Conduct regional land use inventories

Goal #3: Vitality and Sustainability

Objective: Maintain best practices regarding the natural environment and its interactions with the built environment

- o Maintain ongoing monitoring programs and prepare studies that shed light on ongoing activities on regional natural resources

Document Title: *One Community One Goal Plan*

Document Date: *2012-2017*

Organization: *The Beacon Council*

Consultant/Author: *The Beacon Council*

Category: *Economic Development*

Document Description

The purpose of One Community One Goal (OCOG) is to provide Miami-Dade County with a roadmap for its economic, entrepreneurial and educational success. It is a collaborative platform that promotes community-wide economic development and prosperity in Miami-Dade County, by driving innovation, leveraging strengths, providing clear thought leadership, and coalescing public and private priorities.

This community-wide initiative has achieved its five-year goals (2012 – 2017) of assisting our community with increasing higher paying jobs, enhancing our educational ecosystem and helping build a vibrant population of young professionals.

OCOG is continuing as an ongoing initiative. Its mission is to continue bringing a broad spectrum of Miami-Dade organizations together to advance the goal of a thriving, inclusive and diverse community. The goal is to transform Miami-Dade County into a resilient business community that provides the opportunity for economic prosperity for all. OCOG will be:

- increasing its focus on community engagement and inclusiveness,
- amplifying efforts in the areas of innovation, education and entrepreneurship,
- and driving community-wide priorities and resiliency. This Target Industries report recommends and describes potential target industries for Miami-Dade County's future economic development initiative, One Community One Goal.

This report will educate area leadership and the public on the inner workings of each target industry, provide a list of recommended niche sectors within each target, and establish the direction of the final phase of this project, the Target Industry Strategies. The Target Industries are:

- AVIATION
- CREATIVE DESIGN
- HOSPITALITY & TOURISM
- INFORMATION TECHNOLOGY
- INTERNATIONAL BANKING & FINANCE
- LIFE SCIENCES & HEALTH CARE
- TRADE & LOGISTICS

Document Title: *South Dade Area Plan Initiatives*

Document Date: *2008*

Organization: *Miami-Dade County*

Consultant/Author: *Miami-Dade Department of Planning and Zoning*

Category: *Planning*

Document Description

The document is a compilation of land use/development plans intended to demonstrate the development of 9 sub areas located along the US 1 corridor. The intention of the plans is to maximize available infrastructure and re-direct growth in a manner that avoids further urban sprawl. The area addressed are:

- Downtown Kendall Metropolitan Urban Center
- Perrine Community Urban Center
- Cutler Ridge Metropolitan Urban Center
- Old Cutler Road
- Goulds Community Urban Center
- Princeton Community Urban Center
- Naranja Community Urban Center
- Leisure City/Naranja Lakes Community Urban Center

Potentially Relevant Findings/Conclusions For South Dade Economic Development Strategy

This plan incorporated specific recommendations for land use code changes that have not been fully implemented. It is recommended that all applicable land use changes be implemented in order to have consistent urban development along the US 1 corridor.

Document Title: *South Miami Dade Watershed Study and Plan*

Document Date: *March 2007*

Organization: *Miami-Dade County, South Florida regional Planning Council, South Florida Water Management District*

Consultant/Author: *Keith and Schnars, P.A.*

Category: *Sustainable Development*

Document Description

This report is about the future of South Miami-Dade County. It is a report that presents a vision and a plan for a healthy and sustainable environment and economy for this important Watershed. This vision and plan are based on nearly four years of public input and over 4,000 pages of technical analysis.

The Watershed Plan presented in this report is based on the well-recognized and tested concepts of Smart Growth and sustainability. The Watershed Plan, if adopted and implemented, will demonstrate great vision and leadership and put South Miami-Dade County on a sustainable path to 2050. The Watershed Plan will help protect the waters of Biscayne Bay, reduce traffic congestion, preserve wetlands and agriculture land, promote tourism -- and cost billions of dollars less than the current path of sprawl.

The Recommended Watershed Plan consists of two major parts: the Watershed Plan Design Guidelines and the Implementation Strategies. Part one, the Watershed Plan Design Guidelines, creates a temporal and spatial policy framework for Smart Growth and resource protection to the year 2050.

Potentially Relevant Findings/Conclusions For South Dade Economic Development Strategy

- Recognized as one of the most critical watersheds in Florida, the South Miami-Dade Watershed is located in the southeastern portion of Miami-Dade County between two national treasures: Biscayne National Park and Everglades National Park. It comprises 371 square miles (237,440 acres). The Watershed plays a vital role in the health of Biscayne Bay as well as providing for the urban and agriculture needs of the County. This Watershed coincides with the study area for the South Dade Economic Development Strategy.
- General Watershed Plan Guidelines:
 - More compact building design;
 - Mix of commercial and residential land uses;
 - Greater densities along transit corridors;
 - Variety of transportation choices;
 - Creation of walkable neighborhoods;
 - Preservation of open space, wetlands and farmland;
 - Better protection/management of surface and ground waters; and
 - Enhancement of tourism and economic development
- Specific Watershed Policy Guidelines:
 - Temporal Policy Guidelines

- 2007 through 2025: Allocation of 100 percent of the required 102,000 dwelling units inside the existing Urban Development Boundary (UDB) through 2025;
 - 2026 through 2050: Allocation of a minimum of 60 percent (61,000) of the required 102,000 dwelling units inside the existing UDB between 2026 and 2050;
 - Consistent with the CDMP and Implementation Strategies, allocation of a maximum of 40 percent (41,000) of the total required dwelling units outside the existing UDB between 2026 and 2050.
- Spatial Policy Guidelines
 - In coordination with local municipal plans, utilize the eight existing consensus-based charrette areas in the Watershed at 75 to 100 percent of the densities approved and agreed upon by the municipalities, resulting in 40,000 to 50,000 units in the charrette areas;
 - Make completion of enhanced transit corridors a priority, including completion of the Metrorail to Florida City;
 - Establish two major zones (A and B) along enhanced transit corridors to guide the allocation of dwelling units;
 - Consistent with the charrette areas and Zones A and B, establish a minimum of five major development nodes along transit corridors;
 - Encourage municipalities located in Zones A and B to utilize Smart Growth approaches, including higher residential densities and mixed use developments. The determination of how to distribute the density would be determined by municipalities; and
 - Establish an open space/conservation zone (Zone C) that ensures that lands needed for the protection of Biscayne Bay are available for stormwater treatment, wetlands restoration and open space.
- Watershed Plan Guideline Zones

Zones A and B are established for the purpose of creating a general guide for a higher density, transit oriented development pattern. These zones do not create rigid regulatory boundaries and it is not the intent that the entire area within these zones will achieve the average densities prescribed.

 - Zone A: Located $\frac{1}{4}$ mile on each side of US 1. Minimum density of 15 units per acre and average density of 21 units per acre. It is not intended or recommended that every acre in Zone A would have these densities.
 - Zone B: Generally located $\frac{1}{2}$ mile on each side of US 1 and along other major corridors such as Kendall Drive and 137th Avenue. Density range is 6 to 20 units per acre with an average of 10 units per acre. It is not intended or recommended that every acre in Zone B would have these densities.
 - Zone C: Located on the eastern portion of the Watershed near the confluence of Canals C-1, C-102 and C-103 with Biscayne Bay. This approximately 18,000 acre area may be used for a combination of stormwater treatment areas (STAs), wetlands restoration (including the Biscayne Bay Coastal Wetlands CERP project) and open space (including agriculture). It is important to note that it is not

anticipated that all of this area will be needed. A larger area than potentially needed was selected to provide the County and willing seller landowner the greatest flexibility in the use of Zone C. Zone C is an integral part of the Recommended Watershed Plan. Under all growth scenarios the discharge of water pollutants into Biscayne Bay increases. In this regard, it will be necessary to capture and treat stormwater runoff before it enters the Bay. The area of Zone C was selected because of its landscape position in relation to the three major canals that result in the highest pollutant load increases.

- Part two of the Recommended Watershed Plan is a set of 67 implementation strategies that provide the policy direction needed to make the Plan effective and implementable. These strategies were developed after extensive discussions with the WSAC and stakeholders. If adopted, many of these strategies, along with the Design Guidelines, would be codified in the County's CDMP or other policy documents.
- The implementation strategies are organized into the following categories:
 - Overarching Policy Framework of the Watershed Plan General Implementation Strategies Thematic Implementation Strategies
 - Agriculture
 - Economy
 - Housing
 - Natural Communities/Open Space
 - Property Rights
 - Smart Growth Economic Incentives
 - Transportation
 - Water Resources

For more information on the plan, please visit <https://www.miamidade.gov/mayor/library/memos-and-reports/2012/03/03.30.12-Watershed-Study.pdf> for complete plan details.